SERVING THE TOTAL FOODSERVICE INDUSTRY

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APRIL 17, 1991

RESTAURANTS & INSTITUTIONS

20

COST-CUTTING IDEAS FROM R&I's INSTITUTIONAL GIANTS

MENU MASTERS REVEAL THEIR SECRETS

◀ *Pasta & Imagination Stretch The Seafood Dollar*

TASTE OF THE SEA

Chesapeake Classics

Shrimp And Shellfish

More Inside! See Page 4

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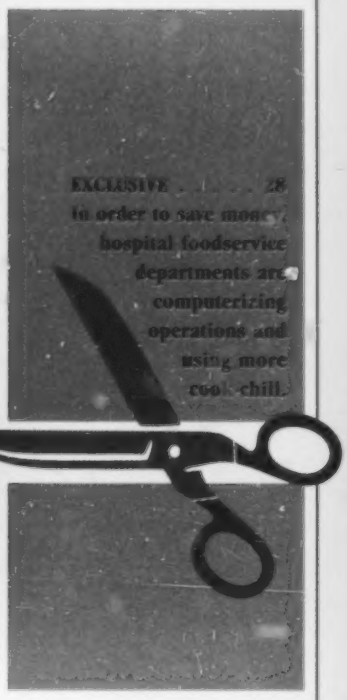
EXCLUSIVE 28
In order to save money, hospital foodservice departments are computerizing operations and using more cook-chill

28 R&I EXCLUSIVE: INSTITUTIONAL GIANTS' COST-CUTTING GUIDE

Look to this year's Institutional Giants, the country's largest schools, colleges, contract feeders, independent hospitals and hospital chains, and military foodservice operations, for money-saving ideas. Their suggestions could fit into any foodservice operation.

64 SPECIAL REPORT: MENU MASTERS SPILL THEIR SECRETS

Joe Baum, Cindy Brennan, Joe Byrum, Don Clawson, Joyce Goldstein, Michael Grisanti, Ray Lindstrom and Richard Perry all spent an afternoon talking with *R&I* editors about what goes into the creation of a menu. Discover their secrets in this feature.

89 MENUS: MARKETING, PROMOTIONS AND CONCEPTS

This issue's Menus section takes us to Chicago, where a private day school has turned its cafeteria into a mini bistro, and where a cafe offers a 10% discount to specially clothed customers. Also profiled is Shoney's Seafood Fest.

96 EASTERN CLASSICS FROM THE CHESAPEAKE

The Chesapeake region is filled with culinary treasures—crabs, clams, oysters, corn, peanuts and tomatoes—that its cooks put to good use in both classic and contemporary dishes. Our Taste feature stops in at some of the area's most innovative restaurants.

110 ON THE COVER: SHRIMP STARS ON THE WHOLE MENU

Shrimp is America's favorite crustacean, according to *R&I*'s most recent Tastes of America survey. And how do diners like their shrimp? In entree salads, fried on seafood platters, and grilled or boiled with piquant sauces on the side. Shrimp and pasta, as pictured on our cover, is a classic, cost-efficient pairing, too. Refer to our Food feature for shrimp recipes.

R&I EXCLUSIVE

COST CUTTING GUIDE

Institutional foodservice, more than ever before, is a business—and operators are taking a hard look at the basics of their operations to find ways simply *to run better*.

That means negotiating lower food costs, reducing food waste, identifying bestsellers and poor performers, evaluating how employees use their time, reducing paperwork by computerizing systems, and investing in technologies that cost now but will save later.

The economic conditions forcing these changes differ for each institutional segment. Contractors, for whom the recession has meant a decline in customer base, are reorganizing to operate

by line of business rather than by geographical zone. This specialist approach to foodservice eliminates duplicate jobs and makes lines of communication more direct.

In schools, the loss of many commodities has hit hard—the cheese on a slice of pizza that used to cost 7 cents with commodity allotments can cost as much as 35 cents when the cheese has to be bought outright. Schools with low participation in free and reduced-price meal plans are opting out of the National School Lunch Program because they

can break even, and even make more money, from a la carte sales. One director says he firmly believes that reimbursement for free and reduced-price meals will be tied into how well schools follow the new dietary guidelines—making compliance

for reimbursement even more complicated.

Many colleges and universities are experiencing declines in enrollment. In Iowa alone, the number of graduating high-school seniors has dropped to 32,000 this year from 50,000 five years ago. Administrations are asking foodservices to give more to the general fund of the whole institution.

In health care, patient stays are shorter and competition is hot. Not only are foodservices looking for new sources of revenue, but it's becoming the norm for foodservice directors to oversee housekeeping, security, laundry, building maintenance and even the mailroom. Health-care facilities are taking advantage of computerization and cook-chill. They are expanding into day care and in-home feeding. And many single facilities are banding together to

purchase, and save, in volume.

On the pages that follow, *R&I*'s Institutional Giants share some of their best cost-cutting measures. Most will attest that, despite economic hardships, there has never been a better time to be in the business. Being forced to cut the fat and become more efficient has shown them that they have what it takes to meet the challenge.

SIX GREAT SAVINGS

1. Hillsborough County Schools cuts costs by 3 cents a plate with a new staffing formula.

2. Michigan State saves $40,000 annually in central processing costs with new automated time clock payroll system.

3. Cedars Sinai Medical Center saves $66,432 in labor costs by serving convenience foods.

4. Manor Care renegotiates vendor contracts and saves 3% on food cost.

5. Army & Air Force Exchange saves thousands of dollars with new central test kitchen.

6. Federal Reserve Bank, a Marriott account, cuts food cost by 20% with batch cooking.

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INSTITUTIONAL GIANTS

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Timely equipment purchases, efficient staffing and "smart" buying save schools money.

	1990 F&B purchases ($ millions)	No. of schools	No. of students	Meals/ year (millions)
New York City Board of Education Long Island City, N.Y.	$115.0MM	1,253	966,376	125.0MM
Los Angeles Unified School District Los Angeles	74.5	580	620,950	63.8
Chicago Board of Education Chicago	49.3	581	450,000	48.0
Dade County Schools Miami	36.0	270	292,000	38.0
Houston Independent School District Houston	18.7	229	191,284	32.9
School District of Philadelphia Philadelphia	17.6	262	189,511	12.2
Detroit Public Schools Detroit	17.0	260	170,000	17.0
Hawaii Statewide Schools Honolulu	16.4	230	169,000	23.7
Dallas Independent School District Dallas	15.3	185	129,499	15.6
Hillsborough County School Board Tampa, Fla.	13.6	145	125,816	18.6

NEW EQUIPMENT WILL SAVE THOUSANDS
Detroit Public Schools

Sometimes you have to spend money to save money. That's the thinking of Michael Dinan, director of foodservices at Detroit Public Schools. Last year, he allotted $500,000 a year over the next three years to buy five new $33,000 delivery trucks and equipment for 42 base kitchens.

The trucks especially will be a blessing, according to Dinan. "The repair costs on the trucks alone were absolutely prohibitive," he says. "We have 20 trucks delivering meals for 80,000 students at 200 schools each day. Some of the trucks are 10 or more years old. On a daily basis, anywhere from one to five schools were not getting their meals because trucks were breaking down or in the shop." Breakdowns also meant that the district was not being reimbursed for those missed meals—a significant amount of money considering that 80% of the students receive free and reduced-price meals.

Dinan's money came from an existing equipment fund built into his budget that, if not used within the year, went back into the general fund in returned monies. "I met with the new superintendent and he agreed to my equipment replacement plan, even though it meant less money being returned in the short term," says Dinan.

For those districts that haven't the benefit of existing money for equipment replacement, Dinan suggests projecting higher a la carte and reimbursable meal sales and using the higher revenue projection toward an equipment expense line item on the budget proposal. "It means doing everything in your power to increase participation, such as adding breakfast, after school and summer feeding to increase revenues enough to cover the cost of added services as well as new equipment," says Dinan. "Even if you don't quite make your projection in the first year, the efficiencies afforded by new equipment will save you in the long run."

STAFFING FORMULA CUTS 3 CENTS/PLATE
Hillsborough County School Board

When Mary Kate Harrison took over as Hillsborough's director of foodservices in April 1990, the department was in severe debt. "I realized I had to make some major changes in the way we operated, and the place to start was with our staffing allocation formula," says Harrison.

In June 1990, each labor hour produced 12.3 meals; personnel costs per plate were $1.016, 11 cents higher than the previous year. To remedy the situation, Hillsborough enacted a hiring freeze, and employees from overstaffed schools were transferred to understaffed schools. Throughout this "balancing" act, no one was laid off. "Previously, managers would just hire someone anytime they thought labor was tight—there were no controls. Now there are," says Harrison.

As a result of the new staffing formula, the number of meals per labor hour averages 13.8, and personnel costs are down 3 cents per plate. "The changes we made were really tough to do," says Harrison. "But there's a feeling here that we can do anything."

PURCHASING 'SMART' REDUCES COSTS
Dallas Independent School District

Foodservice employees in the Dallas Independent Schools know that cost control is in the details. Tracking inventory; checking sales and traffic histories; scraping No. 10 cans; keeping a tighter control on "hidden cost" items such as straws, napkins and condiment packages; using leftovers in soups; being more careful about not burning food; and tightening portion control are just a few ways they've found to maximize purchases.

Over the past two years, cafeteria managers have refined their food purchasing and usage procedures, and Marjorie Craft, director of foodservices, estimates their efforts have reduced food costs by 2% to 5%. "The tools we need to purchase the right amounts of food have always been in place," she says. "We're just teaching everyone to use them better."

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INSTITUTIONAL GIANTS

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COLLEGES & UNIVERSITIES

Investing in technology, serving to order and recycling all shave food and labor costs.

TOP 10 COLLEGES & UNIVERSITIES

	1990 F&B purchases ($ millions)	Total enrollment	Board contracts	Meals/ year (millions)
Michigan State U. East Lansing, Mich.	$13.8MM	43,166	17,281	7.5MM
Pennsylvania State U. University Park, Pa.	12.5	70,500	14,539	7.0
Brigham Young U. Provo, Utah	11.1	27,000	6,000	11.4
U. of California-Los Angeles Los Angeles	10.1	34,700	4,397	8.5
U. of Michigan Ann Arbor, Mich.	9.0	35,000	8,800	5.0
Notre Dame U. South Bend, Ind.	8.9	10,000	7,000	2.5
U. of Pennsylvania Philadelphia	8.8	18,939	7,495	3.0
Purdue U. West Lafayette, Ind.	8.5	35,500	9,733	4.0
U. of Southern California Los Angeles	8.4	27,000	1,500	5.5
U. of Illinois Urbana, Ill.	8.3	34,300	9,000	5.3

TIME CLOCK TECHNOLOGY SAVES $40,000
Michigan State University

After 26 years, the punch-card time clock and payroll system at Michigan State University was due to retire. But not even the systems department anticipated the savings that a new computerized system would bring, says Dick Sigelko, systems coordinator.

"It used to cost us $45,000 a year to have the cards and payroll processed at a central data-processing unit. With the new system, we pay the unit less than $500 a year," says Sigelko. The new system, which cost $175,000, links three computerized time clocks. Work hours are recorded when full-time and student employees pass their bar-coded ID cards through a laser reader. Each unit processes its own records and sends a payroll statement to central. The system, purchased in fall of '89, will have paid for itself by this summer.

SERVING TO ORDER CUTS FOOD COST 2%
University of Pennsylvania

At the University of Pennsylvania, "just in time" applies to more than an inventory process—it's the way students are served. The program enables foodservices to produce food just as customers order it. Roasts are sliced onto plates; grill items are cooked to order; and deli sandwiches, waffles and omelets are made when they're asked for in special cook stations. When coupled with self-service for soup, salad, ice cream, fruit and bread, the result is a 2% reduction in food cost, fresher food and lower food waste.

"Our computer system has allowed us to create incredible histories by which to predict traffic and sales by item," says Don Jacobs, executive director of hospitality services. "We used to track foodservice traffic in 15-minute intervals. Now we can get a line graph that gives us a minute-to-minute picture of what traffic to expect, what's going to sell and at what rate. And we produce food accordingly."

STORE-HOUR CHANGES SAVE 2% LABOR
Brigham Young University

University policy at Brigham Young requires that only students may be hired for part-time work and they must be paid a starting wage of $4.60 an hour. Since the people and pay requirements are unchangeable, Director of Foodservices Sam Brooks tried to find another way to cut labor costs.

Foodservices carefully studied traffic patterns and sales in each of the seven cash operations. As a result, three operations close at 2:30 p.m. and reopen at 5 p.m., one operation that opened at 10 a.m. now gains a healthy breakfast trade when the doors open at 7:45 a.m., and one operation closes 30 minutes earlier than it used to. In addition, two dining halls close at 1:30 p.m. each day, open as cash operations at 2 p.m. and turn back into dining halls at 5 p.m. "When you take those small savings in labor hours and multiply them by 1,400 student workers, the result is significant," says Brooks.

RECYCLING PROGRAM PAYS FOR ITSELF
University of Michigan

Twice every 10 days, the dumpster at the University of Michigan Union needed to be emptied—at a cost of $500 each run. As part of a campuswide recycling program, the Union purchased a $10,000 cardboard baler and found a local company that would take the baled cardboard away for free. In addition to cardboard, office paper and newspaper are being recycled as well, further reducing the dumpster volume. Now the dumpster only needs emptying every 22 days.

Not only was the baler paid for in the first year of operation, but the Union an additional $10,000 saved in trash-hauling costs. "Many institutions hesitate when starting recycling programs because they fear the cost," says Don Mask, foodservice director at the Union. "But with some initial investment, recycling can really pay off."

The Union has applied for a $250,000 grant through the state of Michigan, which hinges on the Union reducing its total waste by 80%. The money will go toward the purchase of a solid waste pulverizer-pulper.

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INSTITUTIONAL GIANTS

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Prepared foods, purchasing groups and temporary labor all save money.

	1990 F&B purchases ($ millions)	No. of beds	Meals/year (millions)	Labor cost/ patient day*
Baptist Memorial Hospital Memphis, Tenn.	$6.5MM	2,000	1.2MM	15.14
Cedars Sinai Medical Center Los Angeles	4.9	1,200	2.1	17.58
University of Michigan Medical Center, Ann Arbor, Mich.	4.6	886	2.4	NA
Florida Hospital Orlando, Fla.	4.5	1,150	1.7	17.00
University of Iowa Hospital Iowa City, Iowa	4.3	1,100	2.1	22.54**
Cook County General Hospital Chicago	4.0	1,018	1.8	14.00
MetroHealth Medical Center Cleveland	4.0	750	1.3	NA
Hartford Hospital Hartford, Conn.	3.7	925	2.5	6.00
The New York Hospital New York City	3.0	1,000	2.0	15.75
Long Beach Memorial Hospital Long Beach, Calif.	2.6	998	1.2	NA

*Gross labor cost per patient day, does not take revenues into consideration; **includes self-op vending sales converted into meals.

PREPARED FOODS SAVE $66,432
Cedars Sinai Medical Center

When Cedars Sinai foodservices proposed using prepared convenience products for patient meals, the idea was to spend more for food but save on labor. But the numbers turned out to be surprising—food and supply costs came in $66,432 *under* budget—a budget that the administration had already reduced by the amount of the traditional inflation allowance, about $103,000. "In real savings, we're talking about $169,000," says Jerry Berkman, director of food and nutrition.

"We had thought we would have to reduce our labor costs. But with the savings in food and supply costs, not only do we not have to worry about cutting labor, but I have the freedom to appoint more dietitians for special patient services. For example, if I lose two kitchen employees by attrition, I can go ahead and hire a dietitian to work with heart transplant or AIDS patients. In effect, our patient service has improved and it hasn't cost a dime."

PURCHASING ARRANGEMENT TO SAVE 5%
The New York Hospital

A group of 15 to 20 hospitals in the New York City area are negotiating a single-source vending contract that members project could save up to 5% of food and supply costs.

The hospitals would be charged the vendor's cost plus a fee, based on individual hospital purchase volume, but it differs from cost-plus because the vendor would include any manufacturer rebate entitlements when figuring the base cost. Additional discounts would be applied for paying quickly, achieving certain individual and group purchase volumes each month, and allowing delivery at off-hours, as well as for drop shipments, where several hospitals would agree to go and get their own shipment from a common area.

The group also wants vendors to provide extra services, such as seminars to introduce new products and show innovative uses of existing products and backing for a peer review program.

REDUCED LATE TRAYS SAVE $100,000
Florida Hospital

Florida Hospital has the benefit of a total quality management team, an in-house consulting group that studies hospital departments and suggests ways to cut costs and improve quality. When it was foodservices' turn, the group came up with a way to reduce the food and labor costs that late trays ring up. Ed Newsworthy, director of food and nutrition services, estimates their work will save him $100,000 a year.

"When patients' diets were changed, or the patients were transferred to different wings, or orders simply were not communicated properly, we would have to rethermalize a second tray and expend the labor to get the correct tray to that patient," says Newsworthy. "The whole late-tray process was costly."

The quality management team suggested ways to improve communication. Now, foodservices is linked into nursing station information systems so that order changes can be communicated quickly and accurately.

TEMPORARY HELP REDUCES LABOR COSTS
Long Beach Memorial Hospital

While she can't put an exact dollar amount on savings, Anita Siverly, director of food and nutrition services at Long Beach Memorial, says the use of a temporary employment agency is saving substantial labor costs. "We have a fantastic arrangement with the agency we use," she says. "And the flexibility it's afforded us is invaluable."

At times, up to 10% of the foodservice employees at the hospital are temporary. "We can hire only as many as we need at a given time without having to pay employee benefit costs or waste our time hiring and training someone who does not work out," says Siverly. "And we have been able to recruit permanent employees from the temporary group that has worked here—we have a built-in pool of people who already are familiar with our system."

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INSTITUTIONAL GIANTS

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Health-care chains use custom prepared products and creative menuing to lower costs.

	1990 F&B purchases ($ millions)	Total units	Total beds	Meals/ year (millions)
National Medical Enterprises* Santa Monica, Calif. H,N	$100.0MM	675	61,614	70.0MM
Beverly Enterprises Fort Smith, Ark. N,R	86.5	862	95,220	93.8
United Health Inc. Milwaukee H	85.0**	151	16,500	15.3
Hospital Corp. of America Nashville, Tenn. H	49.5	128	23,400	9.9
Quorum‡ Nashville, Tenn. H	44.8	178	21,067	N/A
Daughters of Charity St. Louis H,N,R	41.0	51	15,264	20.6
Humana Louisville, Ky. H	36.4	81	17,112	9.0
Health Trust Nashville, Tenn. H	28.4	85	11,600	5.7
Manor Care Silver Spring, Md. N,R	25.6	168	23,000	21.7
ARA Living Centers† Houston H,N,R	23.6	240	26,180	NA

*Includes purchases for Hillhaven and unit no. reflects 170 additional managed and affiliate facilities; **includes Purchasing Group total, but all other figures in row apply to Unicare Health Facilities subsidiary (purchases for Unicare are $16.5MM); Hhospitals; Nnursing homes; Rretirement facilities; †*R&I* estimate; ‡source: *Modern Healthcare*, 5/21/90.

PREPORTIONED PRODUCTS SAVE LABOR
Unicare Health Facilities

Unicare Health Facilities, in conjunction with UHF Purchasing Services, a purchasing group affiliate, developed a line of precooked, presliced and preportioned products for center of the plate. Less costly preparation of such items as pork roast, roast beef and turkey breast will mean "hundreds of thousands of dollars" in savings, according to Wayne Goldman, corporate director of foodservice operations. He adds that all of the products received high scores in taste tests.

Unicare projects these items will cut labor costs because they take less time to prepare and employees can control portions simply by serving the same number of slices each time. "A traditional roast takes several hours to cook, time to let it set before slicing, and labor to check it while it cooks, serve it and clean the pans. These products are ready to heat and serve," says Goldman. And because all of the product is used, waste is eliminated.

With reduced labor, employees have more time to generate revenue, for instance, preparing sandwiches for vending contractors, offering additional catering and serving mobile meals.

CREATIVE MENUING CUTS COSTS
Hospital Corp. of America

Most health-care facilities are generating respectable revenues through catering, but Betty Dekle, director of nutrition services at HCA Parkway Medical Center in Lithia Springs, Ga., says catering can cut costs as well. "Too many directors get a catering order and immediately purchase more food for the event. I don't," says Dekle.

Instead, she coordinates her purchases so that items can be used for patient meals, the cafeteria, the snack shop *and* catering. "If you buy good quality foods that are versatile and you menu creatively, you'd be surprised by the gourmet meals you can produce from the items sitting in your walk-in and freezer," she says.

For example, at a breakfast event, Dekle creates Pancakes Oscar, pancakes topped with assorted jellies melted together and a dollop of meringue. With a side of fruit and a sweet roll (from the facility's in-house bakery), the meal is fancy without having cost a cent in extra purchases. A hot chicken salad is a luncheon favorite—it's made with chicken, celery, onions, sour cream, low-fat mayonnaise, pineapple chunks and juice, and a sprinkle of pecans. Dekle tops it with crushed crackers and bakes it. "When I have an event coming up, I decide what I can offer on the menu based on what I have in my inventory. Stir-fries, casseroles, innovative salads—the menu possibilities are endless," she says.

STANDARDIZED PURCHASING SAVES 3%
Manor Care

Manor Care has worked out a new agreement with distributors that standardizes the prices it pays for food. Not only are the chain's food costs down by 3%, but managers have a much better idea of what they'll be paying for food, and budget projections are more accurate than ever.

Previously, distributors would bid on products, and Manor Care would take the lowest bid. But lowest bids varied by region. For example, the markup on frozen foods might be 15% on the East Coast, but only 12% in the Midwest. Manor Care now gathers all the regional proposals, comes up with a markup that it feels is average and fair, and then asks its distributors to give that markup across all regions, says Pat Theimer, purchasing manager for food and beverage. For the example above, that average markup might be 13%.

"Because all units are getting the same markup, we have a much better idea of what our foods are going to cost," says Theimer. "We don't have that price variance to deal with now."

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INSTITUTIONAL GIANTS

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Product testing, renovations and self-insurance cut military expenses.

	1990 F&B purchases ($ millions)	Total units	Meals/year (millions)	No. of employees
U.S. Army Center of Excellence, Subsistence, Fort Lee, Va.	$459.0MM	825	171.7MM	15,116
U.S. Navy Food Service Systems Washington, D.C.	335.9	680	NA	NA
Army & Air Force Exchange Service Dallas	227.4	2,633	168.8	14,345
U.S. Air Force Clubs Branch Randolph Air Force Base, Texas	156.2	277	NA	13,435
U.S. Air Force Engineering & Svcs. Center, Tyndall Air Force Base, Fla.	105.7*	595	77.9	6,500
Department of Veterans Affairs Washington, D.C.	95.0	172	71.5	12,000
U.S. Marine Corps Washington, D.C.	93.1	74	NA	NA
Navy Resale & Services Support Office Staten Island, N.Y.	79.0	642	NA	27,000
U.S. Army Community & Family Support Alexandria, Va.	67.3	515	NA	14,400
U.S. Navy Officer's & Enlisted Clubs Washington, D.C.	65.1	360	14.3	22,500

*Does not include $40MM in food purchased for Operation Desert Shield/Storm.

TEST KITCHEN SAVES THOUSANDS
Army & Air Force Exchange Service

The Army and Air Force Exchange Service has eliminated the expense and trouble caused by inadequate products in the field. How? All food and equipment are tested in a new test kitchen in the Dallas headquarters.

Until five years ago, purchasing and food production for the Army and Air Force Exchange Service was decentralized. But the introduction of several brand concepts, including Burger King (the only national brand), and such in-house concepts as Anthony's World's Greatest Pizza, Frank's Franks, and La Casa Di Amigos, assured product consistency because headquarters standardized recipes, training, equipment and production for each concept.

However, headquarters relied on field tests to approve products. And in some cases, a product that passed specifications did not, for some reason, work well in the field. Reporting problems could take up to several months (AAFES has operations all over the world), well after most of the operations already purchased the product. "For example, we sent field operations a pizza prep table that passed all specs," says Philip Latos, chief, Food Division. "But we found out shortly after that the angle of the refrigerated compartments was off, and sauce was spilling out." Now, AAFES can assure that products and equipment are of top quality before items go out to the field.

In addition, the kitchen has provided a location in which the department can conduct extensive taste tests with a group of people from all over the world who are on assignment at the headquarters, says Latos. That way, AAFES knows its products will appeal to a broad audience.

REMODELING CUTS LABOR ABOUT 15%
Navy Resale & Services Support

The foodservice facility at Naval Station Roosevelt Roads in Puerto Rico has been remodeled and upgraded so that the unit's food-court concepts can run more efficiently and with less labor. It's part of the department's general program to update facilities and lower labor costs at the same time.

"We've taken a close look at how customers order and what employees need to do to fill that order," says Mark Bessette, foodservice specialist. "Improving workflow can be as simple as moving the beverage and napkin dispensers to the end of the line by the register, or as complex as building a central kitchen to service five concepts."

Equipment upgrades have improved efficiency and saved space as well, says Bessette. For example, combination oven-proofers take up half the space separate pieces would, ventless fryers save on exhaust systems, and conveyor pizza ovens take up less space and produce pizzas faster than deck ovens. "Not only have we reduced the labor needed, but sales at the Roosevelt Roads unit alone have doubled since we made the changes," he says.

SELF-INSURANCE CAN SAVE IN PREMIUMS
U.S. Navy Officer's & Enlisted Clubs

Choosing to be self-insured in its traditional high-low deductible indemnity insurance plan has saved insurance costs for the U.S. Navy Officer's & Enlisted Clubs and the Morale, Welfare and Recreation Division.

"It can be risky because we are responsible for paying our own claims," says Sherrie Nious, employee group benefits administrator. "It all depends on how you want to manage your money. If you aren't faced with huge claims, self-insurance can save money because you're only paying the insurance company for processing costs, and not huge premiums every year." Also, if the department were not self-insured, says Nious, the premium costs paid to the insurance company would have risen substantially every year, despite claim experience, simply because insurance costs are going up. "But our experience has been good and our premiums have not increased in two years," says Nious.

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INSTITUTIONAL GIANTS

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Contractors save by eliminating overproduction and centralizing services.

	1990 F&B sales ($ millions)	No. of accounts	No. of employees
ARA Philadelphia	2,700.0	2,600	65,000
Marriott Corp. Washington, D.C.	$2,700.0MM	2,275	80,000
Canteen Corp. Spartanburg, S.C.	1,500.0	1,680	38,000**
Service America Stamford, Conn.	1,100.0*	1,200	22,000**
Seiler Corp. Waltham, Mass.	376.1†	358	NA
Morrison's Custom Management Mobile, Ala.	371.9*	812	12,000
Restaura Phoenix	300.0	300	7,000
ServiceMaster Downers Grove, Ill.	264.0	305	6,000
Harry M. Stevens Cranbury, N.J.	210.0	29	22,500**
Daka Inc. Wakefield, Mass.	200.0	402	4,000

*Includes sales from vending, but unit no. does not include no. of vending accounts. **Reflects full- and part-time employees. Canteen: 30,000 full-time employees. Service America: 18,000 full-time employees. Harry M. Stevens: 500 full-time employees. †*R&I* estimate.

BATCH COOKING CUTS FOOD COSTS 20%
Marriott Corp.

At the Federal Reserve Bank in Chicago, batch cooking, reducing inventories by 10% and controlling portions have saved the department about 20% in food costs. Since the changes started six months ago, food costs have dropped to 53% from more than 70%. "We've reduced the bank's subsidy by more than $20,000 a month," says Martha Restrepo, general manager.

Restrepo and managers developed strict guidelines on how to batch cook and portion foods. Each morning, they meet with employees to review the menu, decide how much needs to be prepared and how large portions should be. "We tell our staff that a double helping is not good for us or the customer," she says.

Batch cooking has had an incredible effect on reducing overproduction, according to Restrepo. "If we were serving fried chicken, our cooks used to fry it all ahead of time. Now they prepare smaller batches as needed. If there is leftover chicken, it's perfectly usable because it hasn't been fried yet," she explains. Although clients might have had to wait for food when the program was initiated seven months ago, employees have since become adept at producing the right amounts of food on time.

SCHOOLS RAISE PARTICIPATION
ARA

East Ramapo Central School District in Spring Valley, N.Y., increased participation 15% over last year and now is operating in the black instead of the red. While she would not provide figures, Susan Romanoff, foodservice director, cites several changes that led to the deficit elimination.

"When I came here in 1989, I met with the PTA, students and teachers and got a good picture of what they wanted from our foodservice," says Romanoff. Sandwich bars are just one example of new programs that have increased participation in the 15-school district. Since the bars have been offered, participation has increased 100% in one high school, 60% in another, and an average of 50% in three junior high schools.

"We also changed our central kitchen procedures," says Romanoff. Full meals used to be prepared, frozen and shipped out to schools. Now, items such as grilled chicken, hamburgers and vegetables are shipped out in bulk and prepared on premises, so food quality has improved, according to Romanoff. "We saw a very minimal increase in labor," she says. "Some of the employees working in the central kitchen were simply transferred to schools, and are working the same number of hours they always were."

CENTRAL KITCHEN SERVICES 15 CLIENTS
Morrison's Custom Management

City Events, a 6,000-square-foot facility opened by MCM's Manask corporate dining division in downtown Los Angeles, provides foodservice to area clients that have limited or no in-house foodservice facilities. City Events provides four services for MCM clients: hot food prep, cold food prep, baking and catering. In fact, the facility, which houses a complete administrative office for catering, also operates much like a separate catering company. Completed in fall 1990, it features the latest in kitchen equipment, a complete bakery and transport capability.

The centralized aspect of the kitchen is cost effective for MCM because foods can be ordered in volume, utility costs are lower than if each client housed its own kitchen, and the facility can produce what it needs with fewer employees. "We can save clients up to 50% of space costs because we don't need much room in their offices to deliver our foods and their capital expense is about ⅓ to ½ less than it would be were they to put in a full kitchen with venting, exhaust and equipment," says Art Manask, regional vice president. **R&I**

ACTION EXPRESS

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PIZZA CHAINS BEEF UP MENUS, FINE-TUNE DELIVERY SYSTEMS

Specialty pizzas, sandwiches and pasta are most popular menu extenders.

Pizza Hut, Domino's and Little Caesars, the top three pizza chains, have their game plans made. Pizza Hut continues to chase Domino's for the No. 1 delivery spot, while Domino's experiments with free-standing restaurants and tests selling pizza at Burger King restaurants. Little Caesars will offer another venue for its fans. It plans to open restaurants at 400 K mart stores.

The big players' aggressive strategies have second- and third-tier pizza chains racing to catch up. These chains, for instance, Papa Gino's, Mazzio's and Pietro's, are making delivery their No. 1 priority. Papa Gino's will add delivery in 100 more stores this year. Mazzio's, where delivery accounts for 45% of sales, plans to "dive in" to the service this year, says Greg Lippert, marketing director. And there's no doubt about Mazzio's target: "We need to keep up with Pizza Hut in each of our markets," Lippert says.

Italian dinner-house operators have their own challenges to meet. With everyone from contractors to chicken chains adding Italian offerings, restaurants such as The Olive Garden and The Pasta House are focusing on keeping customers interested in *their* menus. The solution? Constant specials, great big platters and seasonal menus.

PIZZA HUT
$4,900.0MM

Wichita, Kan.-based Pizza Hut keeps adding to its line of specialty pies, priced at $12.99 for a large. The standard specialty lineup now includes the Super Supreme (nine toppings), the Supreme (six topoings), Meat Lovers, Cheese Lovers Plus (two toppings sandwiched between two layers of cheese) and Veggie Lovers.

Light Pizza, tested last year in Columbus, Ohio; Nashville, Tenn.; and San Diego, still needs work, says Pizza Hut spokesman Roger Rydell. Thanks to low-fat cheese and meat toppings, the pizza (Supreme Light, Pepperoni Light and Meat Lovers Light) contained one-third less fat than regular Pizza Hut pizza. Although taste tests showed customers liked the pizza once they tasted it, the problem was getting people to try it, Rydell says. "We marketed it toward our heavy users, young males, not people who were interested in a light product," he explains. Pizza Hut will test Light Pizza again—with a new advertising angle—in the "not-too-distant future," Rydell says.

Pizza Hut continues to search for new ways to get pizza to the customer. The chain now delivers from 3,167 of its 8,040 restaurants, and has full restaurants or kiosks at college campuses, hospitals, airports and business parks around the country.

DOMINO'S PIZZA
$2,650.0MM

In 1990, Domino's broke away from its one-pizza, one-beverage, delivery-only formula with two new projects. First, the chain started selling pizza in four Burger King restaurants in South Carolina. Soon after, it began opening free-standing units, called Pizza Pizzazz, in airports, malls, business districts and sports stadiums.

At Burger King, Domino's sells personal-size cheese, pepperoni, sausage and deluxe pizzas, priced from $1.59 to $2.29. Although Domino's is pleased with the product, the arrangement still needs fine-tuning, says Burke Cueny, director of marketing and special projects for the Ann Arbor, Mich.-based chain. "We still have a lot of measuring to do," Cueny says, guessing the chain will decide by fall whether to expand the test.

The Pizzazz restaurants, 40 of which are scattered around the country, offer a pepperoni, sausage, vegeta-

Pizza Hut's Veggie Lovers Pizza is the latest in its line of top-heavy specialty pies.

ble and deluxe. Custom-made pizzas take 5 minutes. Prices range from $2.29 to $3.60.

Breadsticks with dipping sauce ($1.25), a garden salad ($1.49), a meat-topped chef's salad ($2.49) and beverages round out the menu.

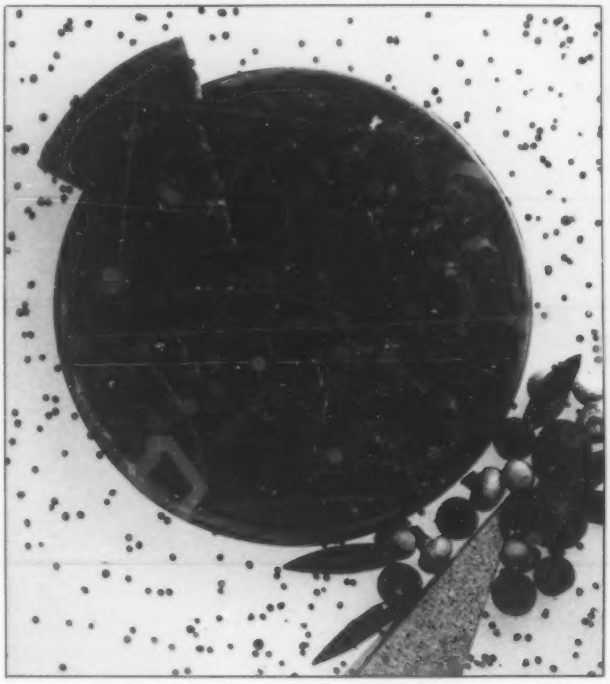
It's unlikely these extras will ever hit the Domino's menu, says Cueny. The delivery stores continue to offer only pizza and soft drinks, and this year will debut a reformulated pan pizza. The new pizza is easier to produce, has a crunchier crust and tastes richer, says Domino's spokesman Michael Jenkins. "It's as good as Pizza Hut's," Jenkins says. "We're going to beat them with their own customers."

LITTLE CAESARS
$1,400.0MM

With its plans to open pizza restaurants in 400 K mart stores, Detroit-based Little Caesars joins Pizza Hut and Domino's in the search for nontraditional sites.

The K mart pizza stores will have the same operating hours as the retailer, meaning they'll serve breakfast, lunch and dinner. The breakfast menu will offer pizzas made with cheese and eggs and topped with bacon, sausage or green pepper; muffins and Danish pastry. Pizza by the slice, Baby Pan! Pan! pizza, sandwiches, salads, medium-size pizza, ice cream and soft drinks will be available for lunch and dinner. Prices for the K mart restaurants haven't been settled, says a spokeswoman from K mart.

Little Caesars has begun tinkering with the bottom of the pizza as well as the toppings. Last year's biggest rollout was Crazy Crusts, pizza dough flavored with sesame seeds, poppy seeds, garlic or Parmesan. The crusts—one or all four—are free for the asking on any Little Caesars' round pizza.



Mazzio's Pizza Light—240 calories and 8 grams of fat per slice—debuted March 1.

THE OLIVE GARDEN
$644.6MM

The Olive Garden this year continues its "menu events." These aren't promotions, insists spokeswoman Anne Powell, but instead are affairs designed to keep both regular customers and employees happy.

For instance, Carnival of Venice took place during Lent, and was the second Carnival for the Orlando, Fla.-based chain. The menu featured nine dishes from Venice. Pasta Venezia, spiral noodles topped with spicy tomato-meat sauce, sold for $7.50 at dinner and $5.25 at lunch. A blend of three cheeses, plus tomatoes, black olives and green onions, topped Pizza Bianco, or "white pizza," priced at $4.50.

The second event, a summer menu, began June 3 and will run to Sept. 3. The summer menu features four new summer salads—chef's; chicken and fruit; swordfish and pasta; and Sicilian fruit—plus two new seafood-pasta dishes. The summer beverage menu offers Venetian Peach, a blend of spiced rum and peach schnapps, and Misty Capri, a lime colada. Summer-menu prices range from $4 to $6 at lunch and $6 to $11 at dinner.

SHAKEY'S
$180.0MM

While other pizza chains diversified with new toppings or crusts, Shakey's added spiced chicken wings to its menu. The wings were introduced last August as part of a combo: A 12-piece chicken order with french fries and a medium, one-topping pizza sold for $10.99. Shakey's President Gene Stone says the wings resulted in record same-store sales increases and "significant" incremental sales.

So far this year, Shakey's has introduced a new spaghetti sauce—spicier and with more texture, than the old sauce, says Jim Fisher,

continued on page 50

PIZZA/ITALIAN
$12.0 billion

11.1% of all
400 commercial sales

TOP TRENDS

- ▶ Big pies: 16- and 20-inch pies with multitudes of toppings for parties and just plain hungry people
- ▶ Reformulated pan pizzas, using Pizza Hut's as a model
- ▶ Promotions focused exclusively on new products, not price
- ▶ Regional specialties and combination platters at Italian dinner houses
- ▶ Lower food costs, thanks to cheese prices at an all-time low

COMING UP

- ▶ High-tech delivery: Computer systems that keep track of regular customers' orders
- ▶ Light pizza via reduced-fat ingredients
- ▶ Off-premises everything: More catering and nontraditional locations, such as supermarkets

CHECK AVERAGES

- ▶ Domino's: $12.50
- ▶ Hungry Howie's: $10
- ▶ Mazzio's: $9.83
- ▶ Mountain Mike's: $8
- ▶ Pizzeria Uno: $7.90
- ▶ The Pasta House: $7
- ▶ ShowBiz Pizza: $6.50
- ▶ Sir Pizza: $6.39
- ▶ Pizza Hut: $6

A complete ranking of the 400 by segment begins on page 21.

400: PIZZA/ITALIAN

continued from page 47

Regional dishes and big platters keep Italian dinner-house patrons interested.

BEST SELLERS

Pepperoni rules, but in different permutations: Here's what sells the best at pizza and pasta chains around the country:

Pizza Hut: Pepperoni pan pizza ($9.69 for a large)

Domino's: Medium pepperoni ($7.99 for a large)

Little Caesars: Pepperoni ($13.48 for two large pizzas)

Shakey's: Thin-crust pepperoni (about $11.95 for a large)

Papa Gino's: Cheese and pepperoni pizza ($7.55 for a large)

Sir Pizza: The Royal Feast—with every topping on the menu ($15.35 for a 16-inch pizza)

California Pizza Kitchen: Barbecue chicken pizza, Thai chicken pizza ($8.50 for an individual-size pie)

Pietro's: Combination pepperoni-salami-beef-olive-and-mushroom ($16 for a large)

Lamp Post: Pepperoni pizza on a medium-thick crust ($13.38 for a large)

The Pasta House: Pasta con Broccoli with cream sauce ($5.50 for a small order; $6.95 for a large)

marketing director for the South San Francisco, Calif.-based company. The chain is reformulating its pan pizza and will knock its price down to match that of its thin-crust pizza. "Our goal is to make it better than Pizza Hut's," Fisher says. Still to come this fall: a new lunch menu that includes pizza, pasta and chicken.

Twenty percent of the Shakey's system offers delivery, but these days, the chain is focusing more on takeout, says Fisher. "We need to get takeout right before we move on to delivery," he says. Takeout ~~accounts for~~ about 35% of Shakey's sales.

PAPA GINO'S
$138.0MM

A large pepperoni pizza ($7.55) is Papa Gino's best seller, says Mike Valerio Jr., operations director at the Dedham, Mass.-based chain. But the chain's menu efforts are geared toward pasta.

Last year's biggest rollout was its Festa di Pasta, an entire section of the menu that lists spaghetti, ziti, fettuccine, tortellini, lasagna and ravioli with the customers' choice of sauce—tomato, meat or Alfredo. Prices range from $2.75 for spaghetti with meat sauce to $4.75 for ravioli with Alfredo sauce.

And Papa Gino's will deliver all this. Delivery, available at 95 of its 218 stores, accounts for 40% of sales. The chain is adding the service to 100 more stores this year.

MAZZIO'S
$137.0MM

A jumbo pizza—at 18 inches, big enough for eight people—joined Mazzio's menu last year. The jumbo is 12% bigger than two medium pizzas but costs the same, says Greg Lippert, vice president of marketing. The price: $11.85 for cheese, plus $1.30 for each extra topping.

This year, Tulsa, Okla.-based Mazzio's will roll out Pizza Light, with one-third less fat than its regular pizza. Low-fat skim mozzarella cheese and an abundance of vegetables in addition to meat toppings lighten up the pizza, Lippert says. A slice of Light contains 8 grams of fat (38% less than regular pizza), 20 milligrams of cholesterol (20% less than regular pizza) and 240 calories (25% less than the regular pizza).

PIETRO'S
$37.5MM*

Pietro's best seller is a combination pepperoni-salami-beef-olive-and-mushroom pizza that sells for $16. Considering the heft of that pie, it's not surprising that last year's test of Häagen-Dazs ice cream bars failed. "People are just too full for dessert," says President Bob Adamowski.

Earlier this year, however, the Linnwood, Wash.-based chain rolled a successful new product: a spaghetti with meat sauce platter, which includes salad and bread ($4.95 for one, $7.99 for two). At lunch, a single-serving spaghetti platter sells for $2.95.

This year, Pietro's will add three new sandwiches—Italian sausage, Italian beef and meatball. New pizzas, new salad-bar offerings and another entree pasta are in test.

LAMP POST
$35.8MM

Tustin, Calif.-based Lamp Post just added delivery last year, and the service now accounts for anywhere from 5% to 50% of sales, depending on the store's location, says Tom Barro, president. (Catering accounts for 5% to 10% of sales per store.) This year, more Lamp Post stores will offer delivery, unless insurance proves too costly, Barro says.

Lamp Post's best seller is pepperoni pizza on a medium-thick crust, priced at $13.38 for a large. Chicken fajita pizza ($17.41 for a large), added last year, also sells well, says Barro. Buffalo wings, too, are new to the menu. An order that serves three to four people sells for $14.95, and a single-serving side order, for $3.95. Both sizes come with blue cheese dressing; the tub comes with carrot and celery sticks on the side. More appetizers, meant to increase check averages, will be added this year, Barro says.

THE PASTA HOUSE
$35.0MM

A brand-new menu and accelerated testing of new menu items will help The Pasta House lure and maintain customers, says John Ferrara, finance director at the St. Louis-based chain.

The new menu offers 45 entrees, compared to 28 on the old menu. Among the new offerings are four combination platters: The Michaelangelo (veal parmigiano, chicken oreganato and fettuccine Alfredo for $10.75); The Raphael (chicken piccata, cannelloni and spaghetti bolognese for $10.95); The DaVinci (manicotti, ravioli and tortellini for $10.75); and The Donatello (scampi, seafood-stuffed shells and linguine with red clam sauce for $11.50). The entrees come with a family-style bowl of salad and miniature loaves of Italian bread, both of which add value to the meal, Ferrara says.

—Lisa Bertagnoli

*R&I estimate

CHAINS BET ON 'LIGHT,' BUT BANK ON HOME-STYLE MENU FARE

Customers demand light menus, while sales of basics and desserts hold steady.

Family dining, always a diverse and interesting segment, is responding to the climate of calorie- and cholesterol-counting by giving customers more of what they say they want: lighter offerings. But family-dining companies also are giving their customers what sales indicate they really want: hearty, home-style fare, ethnic dishes and a signature dessert selection.

Many family-dining chains now have entire menu sections that feature lighter fare. More are adding menu symbols to guide customers in search of such items. For example, Country Kitchen's heart symbol contains the numerals 1, 2 and 3, which designate low-cholesterol, low-sodium and under-400-calorie items. Most chains offer low- or no-cholesterol egg products, sugar substitutes, low-calorie syrup and jam, and decaffeinated teas and coffees. And this year brings a bumper crop of new lighter menu items. (See "Light Menu Add-Ons" sidebar.)

Family-dining menus also reflect customers' concerns, wants and needs in the following areas: quick-meal guarantees, seniors' and children's menu sections, special birthday promos, more flexible meal periods (all-day breakfasts, all-night dinners), and added convenience in the form of drive-thrus, takeout and, in some cases, home delivery.

DENNY'S
$1,528.9MM

Denny's (a k a "Lenny's" by one of the inimitable Corlick sisters) will say "Happy Birthday!" to each of its customers in 1991 with a free lunch or dinner. Denny's tested the program in 1990 in 250 units before rolling it out systemwide at year end.

To heighten its profile as a 24-hour restaurant, Spartanburg, S.C.-based Denny's developed a separate menu for use between 10 p.m. and 5 a.m. Called Denny's 'Til Dawn, the menu features "All Nighters"—dinners, sandwiches and sides from the regular menu, plus six items repackaged for late-night appeal.

Denny's has expanded its popular Grand Slam Breakfast into the Grand Slam Menu to include lunch and dinner.

The Grand Slam Menu has three whopping big items under "The Lunch Line Up": Double-Up Slam (a double-decker burger with one American cheese-and-mushroom-topped layer and one Swiss cheese-and-bacon-topped layer, $5.39), Ballpark Slam (hot dog and burger combo plate, $4.89), and Megamelt Slam (double-decker melt featuring roast beef, Monterey Jack cheese and chilies on top, and ham and American cheese on the bottom, $5.39). All lunch slams come with their own unique accompaniments.

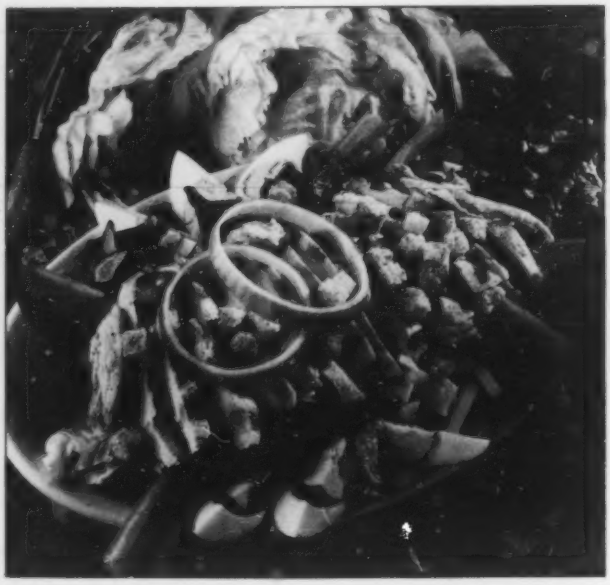
"The Dinner Roster" entrees are served with soup or salad: Surf & Turf Slam (sirloin plus mahi-mahi, $7.99), Country Slam (fried chicken and country fried steak, $6.49), and Kabob Slam (shrimp kebab and boneless chicken breast, $6.99).

Denny's is emphasizing its "In a Hurry?" 10-minute guarantee menu items, senior citizens menu and "Happy Endings" dessert menu.

BIG BOY
$1,000.0MM

Emphasis on quality ingredients, from-scratch salad dressings and daily soups figures heavily into the Big Boy menu description for its Soup, Salad & Fruit Bar, a perennial customer favorite. Big Boy's best-selling lunch item still is its Big Boy—The Hamburger Classic (a quarter-pound hamburger for $2.29), followed in order by the Slim Jim (ham, Swiss cheese, lettuce, tomato and special sauce on a Grecian roll, $3.49), and Fillet of

Apple-Lite Pie has one-third the calories of Marie Callender's regular apple pie.



PoFolks Garden Patch Salad represents 1991's emphasis on light menu offerings, such as grilled and broiled items.

Fish (two fried fillets on a toasted Grecian roll, $2.99). Favorites at dinner are the seafood platter (fried shrimp, fish fillet, clams, smelts and chips, $5.99), the chicken and vegetable stir-fry (chicken strips, mushrooms, pineapple chunks and vegetables in a sweet-and-sour sauce—one of Big Boy's Health Smart menu items, $6.59), and spaghetti (with meat sauce or meatless marinara sauce, $4.49).

The 950-unit Warren, Mich.-based chain is adding five new items to its Health Smart lunch and dinner menus. The entrees, endorsed by the William Beaumont Nutritional Health Program include sides and salad bar. They are chicken mozzarella ($5.99), broiled cod dijon ($5.99), shrimp scampi ($6.99), chicken mozzarella pita (served with the chain's signature Health Smart dressing, $3.99), and roasted chicken breast salad (also served with the Health Smart dressing, $4.69).

The menu's back page shows a nutritional analysis for each Health Smart item. It also gives a phone number for the William Beaumont Nutritional Health Program for further information.

SHONEY'S RESTAURANTS
$933.3MM

Where's the beef? At Shoney's, and customers have no beef about it. Witness the two best promos of 1990 and 1991 respectively: a prime rib dinner and a rib eye steak dinner. Both were priced at $9.99 and included the salad bar. The best-selling menu item is the prime rib dinner, Shoney's specialty, which sells for about $11.99 when not a special.

Customers did complain in 1990 when Shoney's, Nashville, Tenn., discontinued the Sunday and Monday all-you-can-eat specials; for example, Alaska snow crab legs ($14.99) or prime rib ($14.99). The all-you-can-eat specials build traffic on those days and have been reinstated.

Chicken stir-fry, a popular item added in 1990, set the stage for 1991's new lighter chicken and beef items for summer. The entree, priced at $5.99, is served with a teriyaki glaze and Oriental vegetables over rice. It comes with a salad—and a fortune cookie.

Entrees to be added this summer all include the salad bar: hickory-smoked chicken (a grilled half-chicken served with fries, $9.99), a chicken kebab (with fresh vegetables and rice, $8.99), steak Monterey (a 4-ounce fillet with sautéed mushrooms, onions and Monterey Jack cheese, $9.99), and baby back ribs ($9.99).

Shoney's is building check averages by introducing specialty drink menus for frozen concoctions, with and without alcohol, and with dessert trays. Servers bring desserts on trays to the table to stimulate sales. This technique of temptation has paid off, says a Shoney's spokesperson.

And speaking of checks, yours is good at Shoney's, which now accepts personal checks in payment for meals.

INTERNATIONAL HOUSE OF PANCAKES RESTAURANTS
$384.0MM

IHOP is successfully marketing its "treat appeal"—the lure of special items that customers can't conveniently make at home. For example, the Glendale, Calif.-based company has been rolling out its Belgian waffles nationwide. By year's end, the company expects the popular item (which requires its own special round waffle iron) to be in all 490 units. There are four versions: the authentic Belgian waffle (made with buttermilk, $3.25), the Harvest Grain 'N' Nut Waffle ($3.75), Belgian Waffle 'N' Fruit (with whipped topping and strawberries or choice of warm fruit compote, $4,35), and Harvest Grain 'N' Nut Waffle 'N' Fruit ($4.85).

Still successful and still being rolled out is its line of home-style dinners such as Golden Rotisserie Chicken ($5.45). New for '91 is Pork

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FAMILY DINING
$8.7 billion

8.1% of all
400 commercial sales

TOP TRENDS

- Expanded "light" menus
- Hearty entrees, desserts
- Seniors, children's menus
- Grilled and broiled items
- Expanded pasta selections

BEST SELLERS

- Big Boy: The Hamburger Classic
- Shoney's: prime rib
- IHOP: Rooty Tooty Fresh 'N' Fruity (breakfast); international pot pies
- Bob Evans: country-fried steak, grilled chicken sandwich
- Bakers Square: stir-fry and chicken breast dinners
- Cracker Barrel: Chicken 'n Dumplins Dinner
- Howard Johnson: Big Breakfast II; club sandwich and cheeseburger

BEST PROMOS

- Bob Evans: Octoberfest, a smoked sausage link dinner
- Bakers Square: newspaper coupons discounting sandwiches ($1 off), and dinner entrees ($2 off)
- Cracker Barrel: Autumn Applefest

A complete ranking of the 400 by segment begins on page 21.

400: FAMILY DINING

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'90-91 LIGHT MENU ADD ONS

Big Boy: Health Smart items—broiled cod Dijon, chicken mozzarella (entree and pita sandwich), shrimp scampi, roasted chicken breast salad

IHOP: Oatmeal with toppings (breakfast); California Broil (citrus-marinated broiled flank steak dinner)

Shoney's: chicken stir-fry

Bob Evans General Store: grilled chicken salad

Bakers Square: stir-fry dinners; Lite Choice Chicken (salad); chili, salad and bread combination

Marie Callender's: light linguine, steamed fresh vegetable platter, Apple-Lite Pie

PoFolks: new line of Hot Off The Grill entrees

Country Kitchen: seafood pasta salad, herb-grilled chicken breast dinner

Steak 'N Shake: grilled chicken club sandwich

Howard Johnson: "Lite" frozen desserts (ice milk, yogurt, new fruit flavors)

Shari's Family Restaurants: Chicken Breast Fiesta Salad; grilled cod fillet

Country Pride: grilled chicken salad

Bob Evans' General Store sports a dining room, bakery—and store.

Roast (sliced loin of pork served with potato, gravy, choice of two vegetables, and roll and butter, $6).

IHOP is responding to consumers' interest in lighter, healthful fare by introducing more light breakfast and entree items. However, the company points out that so far customers do more talking about light than eating that way. By far, IHOP's best-selling 1990 lunch and dinner items were its hearty international pot pies; its best-selling breakfast item was the Rooty Tooty Fresh 'N' Fruity breakfast combination (two eggs, two bacon strips, two sausage links and two fruit-topped buttermilk pancakes, $4.45). The combo accounts for 8% to 12% of breakfast sales.

Of interest is IHOP's Golden Age Club, launched two and a half years ago, which now has 250,000 members. Seniors fill out applications and are given a card entitling them to special discounts.

BOB EVANS FARMS
$358.0MM*

Bob Evans, Columbus, Ohio, is buzzing about the new General Store: There are two pilot units now, both in Ohio, and five will open by next April. General Store units are 10,000 square feet, twice as big as a regular unit. They have a dining area, a bakery and a general store filled with collectibles (country crafts, pottery, potpourri, coffee mugs, etc.).

The menu is different, too. For example, there is a menu box for specials ("Blue Plate Features"), and sections called "Seniors' Selections" and "The Children's Corner." The seniors' menu offers home-style entrees of chicken, turkey and ham, as well as a vegetable plate ($3.45). Cracked-wheat dinner rolls and honey-cinnamon spread accompany the entrees, along with seniors' choice of one side dish. The children's menu features a cheeseburger, spaghetti, a grilled cheese sandwich and similar dishes.

There are special side dishes, titled "Go Withs" on the breakfast menu, and a "Breakfast for Dinner" menu on the lunch/dinner menu. A "Kitchen Specialties" menu offers some unusual dishes such as Sausage Hash Casserole, and Pinto Beans and Cornbread—for dunking. Kitchen Specialties are priced at $4.75.

A Biscuit 'n' Gravy Birthday Brunch encourages children to register for a free meal and a brownie on their birthday.

MARIE CALLENDER'S
$260.0MM

In 1990 and during the first quarter of 1991, Orange, Calif.-based Marie Callender's expanded its menu in four areas: salads, pastas, lighter entrees and home-style foods.

The salad menu saw the return of Old Fashioned Chunk Chicken Salad ($5.95), and the introduction of chicken sesame salad ($6.25) and Caesar salad (accompanied by toasted garlic cheese bread, $5.95).

Pasta updates included scampi linguine and chicken broccoli fettuccine ($6.95).

New light entrees on the menu include a steamed vegetable platter ($6.95) and a light linguine (fresh pasta tossed with olive oil, garlic, herbs and Parmesan and served with toasted garlic cheese bread, $5.75). Apple-Lite pie, promoted as having one-third the calories of the regular apple pie, debuted on the dessert menu.

Renewed interest in the Homestyle Classics section of the menu brought about Marie's home-style pot roast and herb-roasted chicken (both $7.95), and the Classic Sampler ($9.50)—a combination of grilled lemon chicken and scampi linguine with garlic cheese bread.

In 1991-92, Callender's will introduce "Daily Fresh Sheets" of fresh fish and other daily specials.

POFOLKS
$165.0MM

Menu expansion reflects Nashville, Tenn.-based PoFolks first profitable year after the successful April 1989 financial reorganization. So does the new Country Home design, which has resulted in 25% sales increases among refurbished units.

Although the basic menu fare still is hearty, home-style cooking, PoFolks 1990 summer promotion, Hot Off The Grill, was so successful that all the menu items became a part of the permanent menu and units now are equipped with a char-grill. Grilled dinner specials, served with two vegetables and a biscuit or hush puppies, included white fish ($4.99), two grilled pork chops ($4.99), ground chuck steak ($4.99), and grilled chicken breast ($5.49), which also comes as barbecued chicken breast.

The focus this year is on new appetizers, grilled and broiled products, and salads such as the Garden Patch Salad ($1.29), Chef's Delux Salad ($3.79), and the grilled chicken salad ($3.99).

This year, the chain also will usher in bimonthly dessert festivals. The 15-minute guarantee, Fast Folks Menu, will remain a marketing focus. PoFolks, which now does extensive takeout and catering, is testing drive-thrus and home delivery.

—Nancy Ross Ryan

*R&I estimate

400: CHICKEN

HEALTHFUL ALTERNATIVES SPICE UP CHICKEN CHAIN COMPETITION

Grilled, broiled, baked and rotisserie menu items join traditional fried fare.

Chicken chains are taking a cue from El Pollo Loco, the original charbroil chicken concept, proving there's more to chicken than fried.

KFC, which long resisted supplementing the Colonel's hallmark product, has broiled chicken in the wings. Grandy's Southwest Chicken is that company's first in a series of grill offerings. Pioneer has unveiled rotisserie chicken. And, in what appears to be a reluctant compromise between healthful and homey comfort foods, Bojangles' is introducing skinless fried chicken.

Chains that don't specialize in fried chicken are looking for a change, too. This year, El Pollo Loco will roll out a charbroiled chicken sandwich, its first hand-held product. Mrs. Winner's new oven-roasted, bone-in entree now outsells its famous baked chicken.

Yet, despite trends to the contrary, fried chicken is too down-home and too all-American to go gently into the good night. KFC reports it is still its No. 1 seller.

KENTUCKY FRIED CHICKEN
$5,773.0MM

The Colonel's test kitchens are cackling with activity.

Dinner is KFC's strongest daypart. But the search is on for diverse lunch and snack products to develop daytime business and boost sales during off-peak hours.

The much-heralded Hot Wings rollout a year ago was followed by Lite 'n Crispy chicken, which debuted systemwide in February.

Now, the Louisville, Ky.-based company is testing Monterey Broil, a marinated broiled chicken product, and a line of eight to 10 sandwiches, including barbecued chicken and a chicken-salad pita.

KFC began testing home delivery in a handful of regional markets last year, and will expand the test to an-

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Kentucky Fried Chicken changed its menu to promote more healthful alternatives.

CHICKEN
$7.9 billion
7.1% of all
400 commercial sales

TOP TRENDS

- Grilled, roasted and baked products
- Listing calorie counts on menus
- Promoting combo packs and add-ons to spur traffic and up check averages
- Building traffic during off-hours with snack items
- Delivering to homes and offices

BEST SELLERS

- KFC: Original Recipe fried chicken
- Popeyes: Original fried chicken
- Chick-fil-A: Chargrilled chicken sandwich
- El Pollo Loco: Charbroiled chicken
- Grandy's: Country steak dinner
- Bojangles': Chicken and biscuits
- Mrs. Winner's: 2-piece fried chicken dinner

BEST PROMOS

- KFC Hot Wings
- Bojangles' Biscuit Bonanza, in which a different variety of breakfast biscuit was offered all day long
- Church's 2 + 2 = $2.22—chicken leg and chicken thigh, small mashed potato and small cole slaw, plus biscuit or a roll

A complete ranking of the 400 by segment begins on page 21.

400: CHICKEN

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KFC tests a marinated broiled chicken; El Pollo launches charbroiled sandwich.

other 200 units this year.

The chain also is developing kiosks, express units and other new outlets designed to fit into malls, airports, office buildings and other high-traffic venues.

POPEYES FAMOUS FRIED CHICKEN
$547.0MM

Popeyes' latest menu addition is fried chicken, but with a difference—it's skinless. Chicken tacos, onion rings and fruit salad currently are in test. Seafood gumbo, rolled last year, has been pulled from the menu because of poor sales.

The beleagured Jefferson, La.-based subsidiary of A. Copeland Enterprises also is in the process of developing a double-drive-thru unit.

CHURCH'S CHICKEN
$514.0MM

Church's, also owned by Copeland, debuted its foot-long chicken sandwich late last year, along with a pork dinner and glazed apple pie. In addition, fried fish now comes in dinner and family-size packs.

To build check averages, the Jefferson, La.-based company has begun promoting specific menu items to build customer traffic and increase average checks.

CHICK-FIL-A
$293.7MM

The Atlanta-based chain's chargrilled chicken sandwich and salad lines, dating back to August '89 and heavily promoted since then, rank as the top sellers, with chicken nuggets close behind. As a result, Chick-fil-A shelved chicken product introductions in 1990.

However, fresh-squeezed diet lemonade (32 calories vs. 138 for regular) and New York-style cheesecake, which has heightened the visibility of the chain's entire dessert menu, are stimulating customer counts.

EL POLLO LOCO
$194.9MM

With traffic down nearly 12% last year, the company is banking on a much-needed portable item: a $2.99 hand-held charbroiled chicken sandwich, rolled out in September. In March, El Pollo Loco added a choice of two side orders to the sandwich, and raised the price to $3.99.

During the winter, the Irvine, Calif.-based company introduced a charbroiled chicken salad. Sales were modest but are expected to pick up this summer. Currently in test: chicken tacos and burritos—with promotions putting the emphasis on "chicken."

GRANDY'S CHICKEN 'N BISCUITS
$183.1MM

Low-calorie dinners highlight the chain's new line of grilled entrees. First up: spicy Southwestern Grilled Chicken, a marinated boneless fillet dished up with seasoned rice, green beans and a roll. Calorie count: 405. In test, the dinner racked up 10% to 12% of sales. The sequel: a 350-calorie sandwich version on honey-wheat bread. Both products proved so successful that Grandy's installed grill equipment in all 201 units.

A pair of cobblers, peach and cherry, also were added.

Lewisville, Texas-based Grandy's took fried catfish off the menu because sales dropped off after Easter. The dinner was revived as a Lenten special this year.

Add-on programs include a discount of the 99-cent trademarked "Sinnamon" roll to 69 cents when customers order it with a dinner entree.

BOJANGLES' CHICKEN & BISCUITS
$121.0MM

In the last year, Bojangles', Charlotte, N.C., added Chicken Supremes, strips of fried Cajun-spiced breast fillet, and blueberry-filled Bo-Berry biscuits.

Later this year, Bojangles' will introduce Cajun and Southern Lite, a duo of skinless fried chicken products. Also on the drawing boards: sandwiches, biscuits and baked goods.

Other gambits to beef up average checks include a breakfast value menu, combo packs and larger drinking cups.

MRS. WINNER'S CHICKEN & BISCUITS
$79.0MM

Product introductions have blossomed under new parent RTM's guidance. Among them: oven-roasted dinners, sandwiches, Buffalo wings, chicken fingers and even breakfast offerings.

A fried chicken dinner is Brentwood, Tenn.-based Mrs. Winner's mainstay. But its baked entree, traditionally a close second, is being supplanted by an oven-roasted, bone-in quarter-chicken offering. The dish, introduced last year, is served with wild rice and two side dishes.

New this year: grilled chicken sandwiches, either plain, barbecued or club.

PIONEER CHICKEN
$40.0MM

This other Chapter 11 casualty, based in Canoga Park, Calif., gamely grits its teeth and forges ahead with product additions. New menu items include Blazing Wings, chicken taquitos and rotisserie chicken.

—Barbara Magan Dawson

EL POLLO LOCO HOLDS CONTEST FOR COOKS

Last year, El Pollo Loco conducted the first El Pollo Chicken Challenge. The contest pitted 280 of the chain's cooks, called "cocineros," against each other for the title of best cook.

The competition began in August and ended in October, with six cocineros vying for the top honor. The finalists, hailing from Texas and California, participated in a cook-off in Irvine, Calif. El Pollo Loco executive and research and development staff served as the judging panel.

The intent of the competition, says El Pollo President Jim Berney, was to spotlight the skilled workers who are responsible for quality and consistency at the unit level. The contest, he said, stressed the importance of maintaining quality and standards, while helping the cooks to become more conscious of product color, taste, flavor and moisture content.

El Pollo Loco will repeat the contest next year.

MORE 'SKINNY' SWEETS LINES SHAKE UP THE DIET DICHOTOMY

Dunkin' Donuts cuts cholesterol; Baskin-Robbins leads with artificial fat.

The new generation of sweets might not all fly under the healthful-food banner, but most answer consumers' call for a more healthful twist to their treats.

Ready with products bearing new low-fat, low-calorie and low-cholesterol ingredients, chains responded to health-conscious customers by introducing entire lines of "light" products. The trend extends from mainline menu fare such as Dunkin' Donuts' cholesterol-free doughnuts to nondessert items, for instance, the light mayonnaise used on Dairy Queen's grilled chicken sandwich. The chain will use the spread on other sandwiches served with mayonnaise, too.

Convenience and impulse flavored product introductions, as well. Companies that specialize in special-occasion treats are rolling out products that customers can take home for dessert any night of the week.

DAIRY QUEEN
$2,316.3MM*

Dairy Queen's frozen yogurt, *R&I*'s cover product for last year's 400, now is in about 3,000 units nationwide. The vanilla yogurt, an optional product for franchisees, is served with swirled-in toppings and flavors. It figures from 2% to 12% of the product mix, depending on the season and how it is promoted, according to Mike Sullivan, president and CEO of the Bloomington, Minn.-based chain.

Another new product, a grilled chicken sandwich, debuted last winter. The item, a skinless marinated fillet served with reduced-calorie and cholesterol-free mayonnaise, sports about 300 calories (with lettuce, tomato and bun). Priced at about $2.70, it is required for all DQ Brazier units.

The chain's Blizzard mix-in dessert and Peanut Butter Parfait remain its biggest sellers.

DUNKIN' DONUTS
$913.0MM

No-cholesterol doughnuts have graced Randolph, Mass.-based Dunkin' Donuts menu since last March. Only four varieties on the chain's menu still have cholesterol. Customers like the doughnuts—at least they say so in calls to a toll-free number installed to gauge reaction to the new fare, according to Glenn Bacheller, vice president of marketing.

When it comes to popular menu items, the chain's signature products—doughnuts and coffee—still top other items such as brownies, muffins, bagels, soup and sandwiches. A single doughnut runs about 50 cents; a dozen, about $3.39.

Increasing its presence in airports and institutional outlets such as college and employee cafeteria foodservices figures largely in Dunkin' Donuts' marketing strategy.

BASKIN-ROBBINS ICE CREAM
$671.1MM*

This spring, Fat Free frozen

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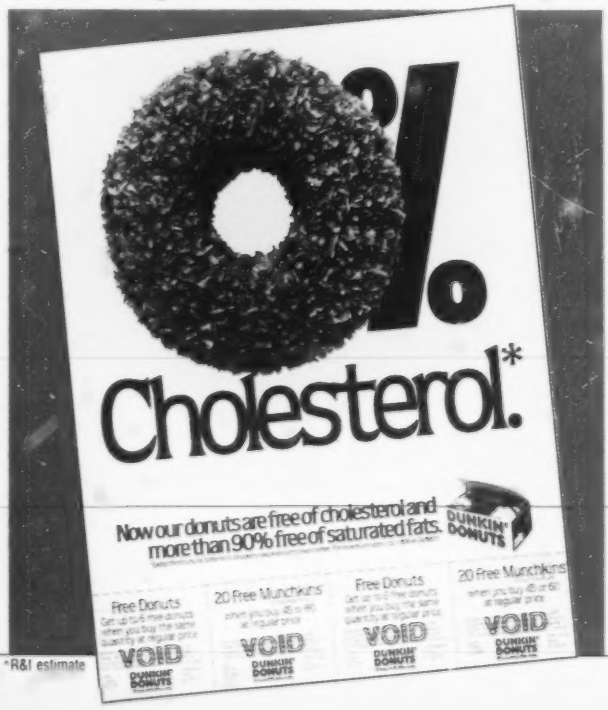
Dunkin' Donuts changed its recipes to make all but four doughnut varieties cholesterol free.



*R&I estimate

SWEETS
$5.9 billion
5.3% of all 400 commercial sales

TOP TRENDS

- Adding full lines of healthful products, not just single items
- Indulging customers' need to "reward" the everyday with a special dessert
- Looking into new markets, both through takeout packaging and limited menu service in volume-feeding situations

BEST SELLERS

- Any product whose first name is Reduced, Low or No
- Vanilla ice cream or yogurt
- Soft-serve ice cream or yogurt with mix-in ingredients such as cookies, candy and fruit
- Novelties—factory packaged for takeout
- Grilled chicken sandwiches

BEST PROMOTIONS

- Dunkin' Donuts: 2-pound packages of take-home coffee for $4.99 sold well around the holidays
- Carvel: special holiday-theme ice cream cakes
- Tastee-Freez: collector car sweepstakes promoted with free-standing inserts offering coupons for food items and an entry blank

A complete ranking of the 400 by segment begins on page 21.

400: SWEETS

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Novelties packaged for takeout bring convenience to signature products.

'SUMPTUOUS AND SKINNY'

The following items show the range of confections on sweets segment menus.

Braum

Sumptuous: **Banana split ($2.69)**

Skinny: **Cup of frozen yogurt (4.5-ounce serving, about 200 calories; 89 cents)**

Dairy Queen

Sumptuous: **Blizzard mix-in dessert (regular-size strawberry, 740 calories; regular-size toffee-candy version, 820 calories; about $1.83)**

Skinny: **Regular-size yogurt cone (nonfat cholesterol-free yogurt; 4¾ ounces, 180 calories; about 93 cents)**

Mrs. Fields

Sumptuous: **White chocolate and macadamia nut cookie (89 cents)**

Skinny: **No-cholesterol peanut butter and chocolate chip cookies (89 cents)**

Tastee-Freez

Sumptuous: **Banana split ($2.39)**

Skinny: **Medium soft-serve ice cream cone (97¾% fat free; 69 to 79 cents)**

dessert joined Baskin-Robbins' Sugar Free and Light dairy dessert lineups. The Glendale, Calif.-based company uses a fat substitute of blended egg whites and skim milk protein in the new product, which has about 100 calories per 4-ounce serving. It comes in four flavors.

The chain also introduced factory-made Chillyburgers, ice-cream cookie sandwiches packaged for takeout, this year. The most popular flavors of the product now are shipped directly to stores. Other flavors are available in the stores, where counter staff assemble them. They are priced at about 79 cents.

Of the chain's 31 flavors of ice cream, customers often choose vanilla, of course, and pralines and cream.

TCBY

$343.0MM

This spring, TCBY, Little Rock, Ark., introduced its line of "slightly smaller" sundaes, called Sundettes. Offered with traditional toppings, the product can be made with any yogurt in the store—regular, sugar free or nonfat. Sundettes run about $1.29 to $1.59.

Typically, a small cup of yogurt (4.5 ounces), in vanilla or chocolate, with candy or fruit topping, is TCBY's best-selling product, says Gale Law, finance director. A small cup is priced about $1 to $1.49.

A new novelty product is the Yog-A-Bar—yogurt on a stick, dipped in chocolate. Manufactured at a plant in Dallas, the bar is available in four flavors, with regular, nonfat, or nonfat and sugar-free yogurt, and it comes with or without almonds in the chocolate coating. The Yog-A-Bar runs $1 to $1.59.

CARVEL

$190.0MM

In the last year, Carvel, Yonkers, N.Y., repositioned itself as Carvel Ice Cream Bakery to focus on its long-time signature product, ice cream cakes. It also expanded its presence in East Coast sports complexes to include Joe Robbie Stadium in Miami, as well as Shea and Yankee stadiums and Madison Square Garden in New York, and the Meadowlands in New Jersey.

Carvel sells a limited menu of fountain items and novelties (such as its signature Flying Saucer) at the sports facilities. Regular stores carry full lines of both, along with the four kinds of ice cream cakes now featured.

This spring, the company launched its Classics ice cream cake line. With such varieties as Butterscotch Nut and Sinfully Chocolate Fudge, this upscale line is positioned as an everyday dessert or snack.

Special-occasion cakes include birthday and anniversary cakes. Character cakes are promoted at holidays—for instance, bunny- and egg-shape cakes for Easter. Carvel also prepares custom-made cakes for events such as weddings. All feature the chain's trademark crunchy filling.

BRAUM ICE CREAM & DAIRY STORES

$163.8MM*

Sugar-free frozen yogurt, fat-free frozen yogurt and a line of premium novelties are new products at Oklahoma City-based Braum's.

Premium desserts include The Supreme, an ice-cream candy bar with caramel, peanuts and chocolate coating, and the Pecan Caramel Fudge Sundae, a 4-ounce premium ice-cream sundae with pecans, caramel and fudge.

The Mix, a soft-serve frozen yogurt dessert with ingredients from normal ice cream toppings to candy and cookie pieces, continues to lead sales. It is available in two sizes—12 oz. for $1.49 or 16 ounces for $1.79.

MRS. FIELDS

$154.7MM*

Mrs. Fields, Park City, Utah, has promoted several items lately. In May, it offered 12 cookies in a tin for $7.99. In June, its Cow Down Cookie promotion offered a special dairy tie-in—when customers bought two cookies, they could get a half-pint carton of milk for a quarter.

Introduced during this spring's promotions, the Cowabunga Cookie is a chewy fudge cookie dipped in white chocolate.

The chocolate chip cookie still wins as Mrs. Fields best-selling product. The chain's cookies are regularly priced at about 89 cents each.

TASTEE-FREEZ

$130.0MM

The Freezee, a mix-in soft-serve product priced at about $1.89, led sales in the sweets category for Tastee-Freez, Utica, Mich., this year. On the other side of the menu, the chain's Big Country Burger, a signature quarter-pound patty with lettuce, tomato and mayonnaise that sells for about $2.39, racked up top sales.

Ice cream and other dessert products make up about 60% to 63% of Tastee-Freez sales, says Jim Brasier, president.

Tastee-Freez's collector car sweepstakes figured among the chain's most successful promotions of the year, says Brasier. The promotion, run annually since 1982, featured a restored 1950 Cadillac in 1990.

—Erin Nicholas

*R&I estimate

400: STEAK/BARBECUE

DINNER BARS BECOME POPULAR AS STEAK SEGMENT DIVERSIFIES

Full-meal specials, new marketing campaigns revitalize chains.

Salad bars and hot food buffets are winning customers and giving vitality to many of the nation's largest steakhouse and barbecue chains.

Segment giants Sizzler and Metromedia Steakhouses—parent of Ponderosa and Bonanza—both have rolled out family-dining-style innovations in the last two years. The most significant: complete dinner specials and specialty food bars. Although prices of dinner specials went up across the segment last year, chains still are promoting them as high-value deals.

Lighter fare is advancing on menus as well. Chains are offering more entree salads and some have even rolled out low-cholesterol beef. Sauces and heavy side dishes are taking a back seat to simplicity, economy and calorie-counting.

Nearly every player in this segment has implemented a buffet of some kind. Grilled and broiled chicken and shrimp dishes were the most popular menu additions over the last year.

Chain founder Ruth Fertel displays a typical meal at Ruth's Chris Steak House.

SIZZLER RESTAURANTS INTERNATIONAL
$916.7MM

Los Angeles-based Sizzler is promoting its new Buffet Court and Grill. This new scatter-bar concept permits customers to serve themselves more quickly, which allows for greater traffic at peak periods. Although unit sales are rising, the setup requires additional employees, which has boosted labor costs. It also has increased food costs, leading the company to revamp its offerings.

Buffet Court and Grill features a hot food bar as well as grilled chicken and tuna sandwiches as alternatives to the usual steakhouse offerings.

PONDEROSA
$699.0MM

Since Ponderosa purchased Bonanza in 1989, more than 60 Bonanza units have voluntarily converted to the Ponderosa concept, allowing the Dayton, Ohio-based branch of Metromedia Steakhouses to expand its market. Ponderosa's systemwide total currently stands at 760 restaurants.

Ponderosa transformed its salad bar into the 70-item Grand Buffet. The chain now serves an upgraded choice selection of meat instead of the previous tenderized utility grade. Also, $3.99 rib-eye meals have been replaced by $4.49 to $4.99 offerings.

BONANZA RESTAURANTS
$515.0MM

Dallas-based Bonanza rolled out four new $5.99 chicken entrees this year, launching the items with a radio and TV ad campaign starring John Ratzenberger from the

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STEAK/ BARBECUE
$4.8 billion
4.3% of all 400 commercial sales

TOP TRENDS

- Food bars, with wide salad and even Mexican selections
- Grilled chicken and shrimp dishes
- Lunch specials at lower prices and once-a-week items
- Expansion into foreign markets
- In-line stores in shopping malls

NEW IN '90

- Sizzler: Grilled chicken and tuna sandwiches
- Ponderosa: Upgraded choice selection meat
- Bonanza: Four new chicken entrees
- Western Sizzlin: Broiled chicken and fish; chicken tips
- Quincy's: Southern-style breakfast, grilled chicken breast sandwich
- Western Steer: Crab legs, crab cakes, pork chops with stuffed cabbage
- Sirloin Stockade: All-you-can-eat Smorgasbar
- Mr. Steak: Caesar chicken salad, seafood lobster salad, Cajun-flavored steaks

A complete ranking of the 400 by segment begins on page 21.

400: STEAK/BARBECUE

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NBC sitcom *Cheers*. The company concentrated its marketing efforts regionally.

WESTERN SIZZLIN STEAKHOUSES
$445.0MM

Trying to set itself apart from a crowded segment, Dallas-based Western Sizzlin introduced a new logo in 1989-90 to promote itself as a "Steak and More" restaurant chain. The logo and a new look for the units are what Chief Financial Officer Tom Buckley calls part of "the Western Sizzlin of the future."

The chain rolled out a new lunch marketing strategy in 1990, with items from $2.99. The new menu includes broiled chicken and fish dishes as well as a chicken tips entree. Some units also offer a fish catch of the day.

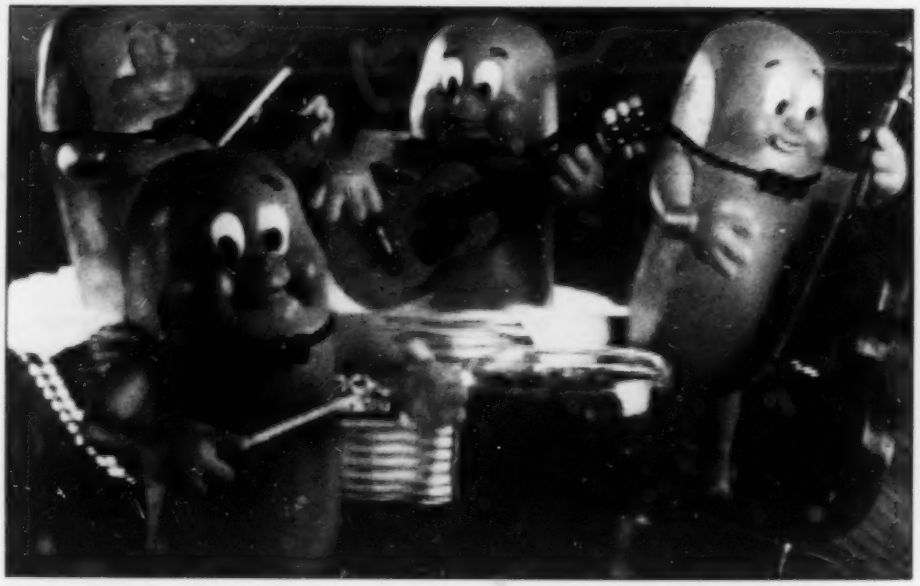
The redesign of Western Sizzlin restaurants features more colorful, brighter spaces with an accent on customer comfort. Top management also has clamped down on franchisees, tightly supervising all operations.

QUINCY'S FAMILY STEAKHOUSE
$281.5MM

Quincy's rolled out its Country Sideboard Breakfast Bar on weekends in 1990. The bar, featuring a classic Southern-style breakfast, has become a staple.

The menu of the Spartanburg, S.C.-based chain features fresh-cut steaks, chicken, seafood and fresh-baked yeast rolls, which were the subject of a new advertising promotion in 1990. Quincy's introduced the Big Fat Yeast Roll, an animated version of the signature item, for TV spots.

New menu items in 1990 included a grilled chicken breast sandwich and a country-style steak sandwich. Quincy's also developed a local-store marketing manual of community relations ideas for each restaurant.



The Big Fat Yeast Roll quartet plays a few bars to promote Quincy's Family Steakhouses.

WESTERN STEER FAMILY STEAKHOUSES
$142.4MM

Claremont, N.C.-based Western Steer actively is pursuing new franchisees outside of its traditional Southeast market in an attempt to become a more national chain. The company plans to expand into other regions in 1991, says Dick Reinhart, vice president of marketing.

Western Steer established its first strip-mall store last year, and Reinhart says it has been enormously profitable, in large part because the 5,500-square-foot store is much easier to maintain than the company's usual 8,500-square-foot outlets. Many of the new stores planned will be in strip malls, he says.

The chain also added theme-buffet nights this year; for example, a seafood night features peelable shrimp, crab legs and crab cakes, and a country cooking buffet offers roast beef, turkey and ham as well as pork chops and stuffed cabbage.

Another product on line is the Intimidator, a large sirloin for two with two baked potatoes. This entree is made from, as are all Western Steer products since 1990, a brand of beef that Reinhart says has three-fourths the calories and cholesterol of regular beef.

SIRLOIN STOCKADE
$64.0MM

One word describes 1990 for Hutchinson, Kan.-based Sirloin Stockade—Smorgasbar. The Smorgasbar is an all-you-can-eat salad, hot food and dessert bar. Last year, the company expanded it and improved food quality, according to Paul D. Roederer, chief financial officer.

New menu items in 1990 include smoked pork chops and a selection of Lite 'N Lean entrees. On line for 1991 are barbecue pork ribs, shrimp scampi and crab salad supreme. Sirloin Stockade also plans to improve its sandwich selection.

To increase average checks, the company initiated selective price increases and featured higher-priced off-menu specials. The largest promotion last year was a Kids Eat Free on Tuesday program.

RUTH'S CHRIS STEAK HOUSE
$60.0MM

The 29-unit steakhouse chain found a great way to bring new customers through the door in 1990. "We started a hotel program wherein we invited concierges, bell-station staff, convention planners, and food and beverage directors from local hotels to try us out," says Dan Earles, senior vice president of operations. "We felt that when they got to know us, meet our staff and eat our food, they'd be able to recommend us to guests with conviction."

The chain makes a point of calling the hotels to get feedback on what their guests thought of the restaurants as well. The plan worked: Customer counts rose 28.3% in 1990, thanks in part to this savvy, word-of-mouth advertising.

Repeat business is one of New Orleans-based Ruth's Chris' strong points as well, according to Earles. Part of the reason is the chain sticks to the basics, doing what it does best—as a result, new

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400: STEAK/BARBECUE

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Chains are using lower-cholesterol beef and trying to reduce calorie content.

menu additions are rare.

"About 25% to 30% of our business comes from corporate travelers. They come back to us because they know what to expect," says Earles. "That's especially important when a customer is entertaining." Exceptions to the menu addition policy this year include a proprietary apple pie, five years in development, which already has captured 30% of dessert sales since its introduction in January.

A Caesar salad and a mixed-grill platter featuring a steak fillet, marinated chicken breast and andouille sausage ($16.50), both introduced in 1990, also sell well, according to Earles.

MR. STEAK
$51.0MM

To build customer traffic in off-peak hours, Englewood, Colo.-based Mr. Steak introduced a Twilight Bites menu, which offers smaller portions at smaller prices in the afternoons. The company started merchandising appetizers and desserts as well as higher-priced entrees via a chalkboard at dinner.

Mr. Steak also updated employee uniforms to a more casual look and stepped up takeout promotions. For additional revenue, the company is booking banquets at restaurants that can accommodate them.

New items in 1990 included Caesar chicken salad, seafood lobster salad and Cajun-flavored steaks. Coming in 1991 are a steak and clambake combo and a spinach chicken salad. Mr. Steak's big promotion in 1990 featured its steak and lobster plate and lobster dinner.

BOBBY RUBINO'S PLACE FOR RIBS
$43.4MM

Predominantly known for its barbecue items, Fort Lauderdale, Fla.-based Bobby Rubino's is showing an increased interest in more healthful items and rolling out an expanded lunch menu, according to Janice Kinker-Weinsoff, director of advertising and marketing.

The lunch menu sports 16 new entrees, four new appetizers and several shrimp selections, most priced under $6. Entrees include grilled chicken salad, grilled shrimp salad and grilled steak salad, all without Bobby Rubino's trademark barbecue sauce.

Bobby Rubino's is also replacing its traditional placemat menu at lunch with a hand-held menu able to list all the new items. "We could have the best product in the world, but if it's not accessible and too expensive, no one will go for it," Kinker-Weinsoff says. Still, the company has introduced some pricier items such as salmon steak, mahi-mahi and coconut shrimp.

After a major test-marketing campaign found that the specialty salads sold very well, Bobby Rubino's launched a three-tiered promotion using direct mail, radio and TV and the new slogan, "Bobby Rubino's—for Rib Lovers and everyone else." *—Neal Pollack*

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400: DINNER HOUSES

CHAINS PROMOTE DIVERSE MENUS AND FAMILY DINING

Entree salads and Italian dishes help capture the "new" dinner-house diner.

With their moderate prices, casual atmospheres and broad menus, dinner houses are appealing to more people than ever before.

To bring customers into their restaurants, chains are expanding both food selections and marketing strategies. The primary focus is on singles and young adults, but children and families have not been neglected. More than one chain has advertised its restaurants as relaxing for the whole family, with early-bird specials and promos aimed at families.

Another trend is the proliferation of entree salads and the introduction of healthful items. But big salads have entered a new age. The classic chef's salad—with its turkey, ham and raw vegetables—has generated popular offshoots. These salads have ingredients such as charbroiled chicken and green peppers, or calamari and other seafood.

Italian offerings also are growing in number, but spaghetti with meat sauce alone won't cut it; new sauces and pastas, new vegetables and seafoods are necessary to suit the kinds of diners dinner houses are targeting.

THE GROUND ROUND
$284.0MM

Changing demographics has made family the new marketing focus at South Weymouth, Mass.-based Ground Round. The Ground Round previously aimed its advertising at single parents between the ages of 25 and 49, but has expanded its strategy to target all adults in that age group, says Judith Kelly, vice president of marketing.

"We're going from being discount-oriented to being more value-oriented," she says. "It's a merging of roles for the family—we're looking at the family as a unit, not just at man, woman and children in isolated roles."

Kelly says the new strategy is based on the idea of a "no-compromise experience" for parents and children. The working slogan is: "Where kids can relax and parents can have fun."

The Ground Round is undergoing menu adjustments, as well, although the hamburger remains the company's cornerstone. Last year saw the addition of a Taste of Italy menu, including grilled chicken marinara and two kinds of lasagna. In the past two years, the company also has tried to feature lighter fare, introducing eight new entree salads.

In addition, Ground Round has begun to feature daily specials, in what Kelly calls an "off-menu menu." Individual managers determine specials, which are made from scratch. These can include meatloaf, turkey breast, roast beef and London broil, all served with mashed potatoes and vegetables. Kelly says Ground Round wants to expand the off-menu to include appetizers and other menu categories by the end of the year.

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Ruby Tuesday's Tostada Salad is one of several new menu items for the company.

DINNER HOUSES
$5.0 billion
4.6% of all
400 commercial sales

TOP TRENDS

- Offering promotions targeted at families
- Introducing diverse entree salads as part of healthful menus
- Serving up lots of Italian dishes, especially pasta and seafood offerings
- Launching off-premises catering, concessions, and home delivery operations
- Increasing menu variety with daily specials

BEST SELLERS

- The Ground Round: Classic hamburgers
- Chili's: Fajitas
- Ruby Tuesday: Chicken teriyaki
- Houlihan's: Cajun shrimp
- O'Charley's: Prime rib

NEW MENU ITEMS

- The Ground Round: Grilled chicken marinara, chicken fingers Parmesan
- Chili's: The Awesome Blossom (an 18- to 20-oz. deep-fried whole onion)
- Ruby Tuesday: Smoky Mountain Chicken, deep-fried pastry shell salads
- Red Robin: Gourmet pizza, Baja steak sandwich
- O'Charley's: Southern fried chicken salad

A complete ranking of the 400 by segment begins on page 21.

←— For information circle 30

400: DINNER HOUSES

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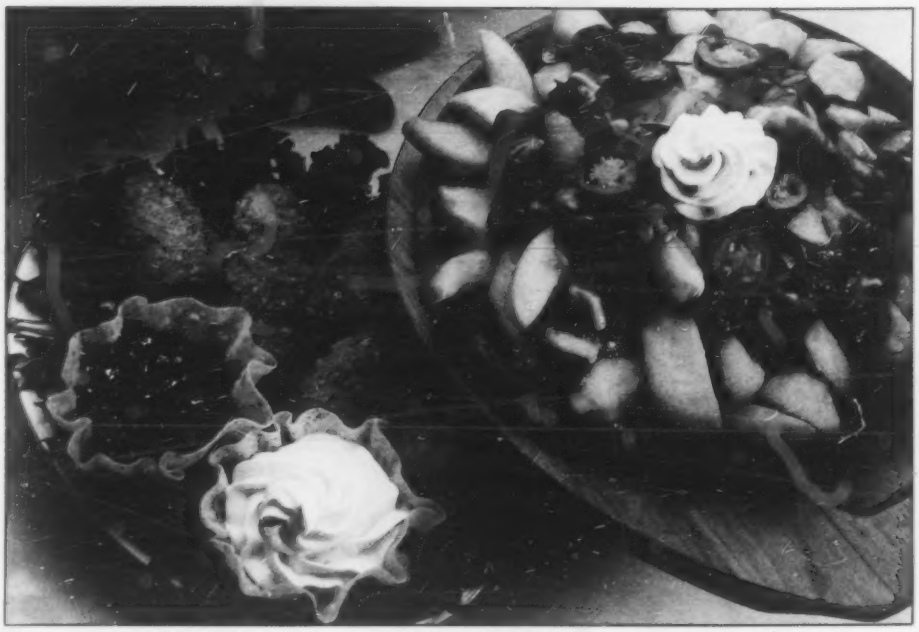
RUBY TUESDAY
$209.0MM**
Mobile, Ala.-based Ruby Tuesday added 31 units this year and is trying to expand further. The company built three free-standing prototypes in Atlanta and one in Charlotte, N.C., as part of a long-term strategic plan for growing away from shopping malls.

A new, streamlined menu, introduced last year, has been augmented by a Pro-Health Dining menu, or PHD, developed by Morrison's Custom Management, Morrison's contract division. New healthful entrees include an open-face chicken breast sandwich, a steamed vegetable plate and a tuna-stuffed tomato. Also new on the chain's regular menu are a barbecue chicken and ribs combination platter and deep-dish apple pie. The most popular menu items continue to be sandwiches, burgers, salads, steaks and fajitas.

Promoting itself as a casual, friendly restaurant, Ruby Tuesday has introduced the tagline "When you're ready to relax" to its advertising campaign.

HOULIHAN'S
$206.1MM
While St. Patrick's Day and the weeks preceding it see Kansas City, Mo.-based Houlihan's biggest promotional push, the chain is diversifying its menu to build business during the other 11 months of the year. After the addition last year of such items as a tortellini salad and Szechwan-fried calamari, Houlihan's menu has become even more varied.

Italian items are the most popular newcomers to the menu, especially gnocchi bolognese and shrimp linguine. Houlihan's also introduced Santa Fe chicken skewers and a Hot Stacked Beef & Cheese sandwich. For dessert, the menu now includes a low-fat frozen yogurt-toffee pie. The chain will add two to six new items by the end of 1991.



Two of Red Robin's new items: Red's Hot Peppers and Chili Cheese Fries.

RED ROBIN INTERNATIONAL
$146.0MM
Irvine, Calif.-based Red Robin takes home the unofficial prize for most original new menu item this year: The company recently unveiled Red's Hot Peppers, a whole jalapeño pepper stuffed with cream cheese, deep-fried in a breadcrumb coating and served with jalapeño jelly. Initial testing brought a positive customer response, but full reaction has not yet been mapped.

Gourmet skillet pizzas, introduced last year, have sold well. Red Robin has added little else to the menu except for a few signature burgers and salads. The classic cheeseburger continues to be Red Robin's biggest seller.

The company featured its "Cruisin' The Coast With Red Robin" promotion in the first quarter of this year, giving out five cruises and more than 100,000 other prizes.

CHART HOUSE RESTAURANTS
$143.2MM*
Simplicity has been a dominant menu theme at the Solana Beach, Calif.-based company, which operates 66 Chart House restaurants in 20 states. Dramatic, free-standing restaurant sites (along a coast, in mountain ski areas or in historic urban buildings), are the company's second signature.

The company's 30th anniversary this month will usher in changes, but not in those two areas. Both menu and presentations will remain uncluttered and uncomplicated.

One menu change—the introduction of a 7- to 8-ounce prime rib cut—reflects the shift to lighter eating. The company says it doesn't expect the small steaks to hurt sales of its 20-oz. Callahan Cut prime rib ($22.75).

Other menu changes are the addition to the plate of a baked potato or rice dish, formerly a la carte menu items. The signature "Squaw" bread is another new accompaniment. Most units also have all-you-can eat salad bars.

The best-selling menu category is fresh seafood (from $15 up), but the best-selling single item is still the 10- or 11-ounce Prime Rib Dinner ($19.95).

Chart House signature dishes include teriyaki top sirloin ($17 to $18) and teriyaki chicken ($15 to $16), both marinated in a special sauce. A top-selling dessert is the towering Mud Pie ($4.45). Appetizers vary regionally, with sashimi popular in California, crab cakes in Maryland. In Boston, the New England Clam Chowder ($4.45) was voted the city's best for the third year in a row in a local media poll.

Most restaurants are open for dinner only, seven days a week, and also weekend brunch. A company spokesperson notes recent rapid growth in catered events during daytime hours.

LETTUCE ENTERTAIN YOU ENTERPRISES
$91.0MM*
Can there be menu trends—

continued on page 106

*R&I estimate, **company estimate

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400: DINNER HOUSES

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Variations on the chef's-salad theme keep dinner-house patrons interested.

or any direction at all—in a restaurant company where creativity is the first order of business and signature dishes are the rule? Twenty-two of Lettuce Entertain You Enterprises units are in the Chicago area. Each restaurant is a different concept with a different decor and menu—with the following exceptions: Ed Debevic's, The Original Gino's East of Chicago and the Italian Tucci restaurants.

Menu fare and check averages range wildly and include fine dining at Everest Room and Ambria; bistro, trattoria and tapas bar chic at Un Grand Café, Scoozi and Cafe Ba·Ba·Reeba!; and country barbecue and Tex-Mex informality at Bub City and The Original A1 Border Beanery.

Nevertheless, there are distinct menu trends among LEYE's diverse collection of restaurants. The prime focus in food has always been taste, says CEO Rich Melman. Recently one of the strongest directions is the Heart Healthy Dining Program, launched in April 1990 in Chicago restaurants in cooperation with the local American Heart Association.

The company says the program is well-liked by customers, with approximately 12% of total sales from heart-healthy dishes. Four restaurants lead sales in that category: Avanzare, Tucci Milan, The Pump Room and Shaw's Crab House.

At The Original A1 Border Beanery, the best seller and the best-selling heart-healthy menu item are one and the same: grilled-on-mesquite chicken fajita ($9.95). At Scoozi, Pollo Stephano, a marinated grilled chicken breast with steamed vegetables ($8.95), tops sales, and at Hat Dance (LEYE's eclectic Mexican concept), 77% of the customers who order dessert ask for the heart-healthy chocolate angel food cake.

But sluggish sales of heart-healthy items have lead to the program's demise at Ed Debevic's. There, the No. 1 best seller is the bacon cheeseburger ($4.55). Customers come to Ed's for a big helping of nostalgia from the '50s (when cholesterol was not a byword) and the hometown diner (where short orders didn't count calories). Salads are prominent in Ed's new 1991 menu items: "garbage," shrimp, chicken and fruit.

Top priorities at LEYE this summer include developing signature dishes for two restaurants slated for fall opening. One will feature foods of the Mediterranean and Greece; the other will be a new Italian concept.

O'CHARLEY'S
$60.0MM

O'Charley's, never known for flashiness or even a signature dish, is busy testing a downscaled menu format that uses a plastic jacket. Unlike its current laminated permanent menu, this menu gives the chain flexibility to change items or prices.

Because the chain plans to focus on a few high-quality dishes, it has cut the number of menu offerings. Although occasionally supplemented by seafood platters and "Early Bird" specials at selected locations, O'Charley's basic fare of prime rib, chicken, sandwiches, salads and other simple, traditional American dishes is its mainstay. The company added five new locations in 1990 and is planning similar growth for 1991. —*N.P.*

400: MEXICAN

POCO PRICES AND MUCHO MENU CHOICES DRIVE TRAFFIC JUMP

Chains set under-a-dollar pricing and mix-n-match menu strategies.

Traffic in Mexican restaurants rose more than 10% in 1990, compared to an increase of 2% for the industry as a whole, according to Consumer Reports on Eating Share Trends (CREST).

Taco Bell, with 70% of the Mexican fast-food market, posted a 12.7% sales jump for the year and set the pace both in value pricing and nutrition-oriented menu introductions.

Quick- and full-service operations alike devised slick promotions hyping a litany of new products, eye-catching presentations and under-a-dollar pricing.

Concern about nutrition shifted menu focus to products low in fat, cholesterol, sodium and calories.

Virtually every Mexican chain added new chicken offerings to its bill of fare.

And while seafood has hooked patrons at Acapulco Restaurants—fish and seafood entrees leaped from 2% to nearly 9% of sales—and Carlos Murphy's—the fish taco is 3% to 4% of sales—it has lost favor at Red Onion and El Chico. Red Onion now features only shrimp and lobster offerings; El Chico has eliminated all seafood from the menu.

Segment-jumping fajitas continue to captivate Mexican restaurant menus, too. And combo platters, which many customers perceive as a value buy, are boosting average tickets at Acapulco, El Torito and Taco John's.

Most chains continue to develop takeout programs.

TACO BELL
$2,400.0MM

Taco Bell's three-tiered pricing format—59-, 79- and 99-cents—has scored a resounding success.

The company's current concern is nutrition. Thirteen of the Mexican giant's 27 menu items are under 300 calories. Its attention also is on the development of fat-free condiments, including taco sauces and salsa. Many flavor enhancers and additives, for example, monosodium glutamate and sulfites, now are shunned.

New on the menu this spring: five skinless, oven-roasted chicken offerings. The products are crisp and soft chicken tacos (79 cents

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Taco Bell's value menu helped the segment leader post a 12.7% sales increase last year.

MEXICAN
$4.3 billion
4.0% of all
400 commercial sales

TOP TRENDS

- Pushing value—nutritional and monetary
- Using chicken in items traditionally served with beef
- Serving combination platters
- Testing to-go products and packaging

BEST SELLERS

- Taco Bell: All tacos
- Chi-Chi's: El Grande Burro
- El Torito: Fajitas
- Del Taco: Tacos, burritos
- Taco John's: Soft taco
- El Chico: Enchiladas
- Taco Time: Crisp Meat Burrito; Crisp Tacos
- Acapulco: Two-item combo
- Taco Villa: All tacos
- Red Onion: Fajitas
- Carlos Murphy's: Fajitas, fish taco

A complete ranking of the 400 by segment begins on page 21.

400: MEXICAN

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Customers say olé! to more chicken options and combination plates.

ACAPULCO OFFERS SERVER INCENTIVES

Check averages at Acapulco Restaurants rose nearly 6.5% during the last quarter of 1990. Reason: "Service Supremo," a comprehensive retraining and incentive program for servers.

The promotion, an exercise in suggestive selling, encouraged the wait staff to memorize menu contents and prices. They learned more about individual entree preparation and presentation so that they could discuss the menu in detail with customers.

The program encouraged servers to promote certain entrees, rotated as weekly specials during a two-month period. Servers earned points for each special ordered by customers at their tables. Certificates of recognition and cash incentives were awarded weekly to the server with the most points in his or her restaurant.

At the end of the promotion, each store's top server entered a drawing for the contest's grand prize: a new car.

each); and a Chicken Burrito, Tostada and MexiMelt (99 cents each).

Products in test include low-calorie chicken, Mexican and fresh garden salads. The Irvine, Calif.-based chain also is studying home delivery.

CHI-CHI'S
$458.9MM

Louisville, Ky.-based Chi-Chi's romance with Tex-Mex heated up with the appearance of several hotter, spicier Tex-Mex combos to balance out the menu's tamer Sonoran cuisine.

The combos are offered with ground beef or shredded chicken. They include Chimiquitos—three taquitos served with Spanish rice, refried beans and chili con queso, a spicy pork-based green chili sauce—and Durangos, which includes two guacamole-topped taquitos and a bean tostada.

Appetizer additions include a line of quesadillas; potato skins stuffed with ground beef, refried beans and melted Monterey Jack and Cheddar; and spicy breaded mozzarella cheese sticks. Light items include grilled halibut topped with ranchero sauce, and a white fish and snow crab salad with light ranch dressing, whole-wheat tortilla, fresh vegetables and fruits.

DEL TACO
$191.5MM*

Customer counts soared 25% in 1990 because of an all-out campaign to step up the menu's price-value relationship and hone operations to provide quicker, more efficient service.

The Costa Mesa, Calif.-based chain now offers 21 items under a dollar. Four separate menus, priced from 49 cents to 99 cents, feature an assortment of nachos, tacos, soft tacos, burritos, burgers and fries. Another lure: six- and 10-item takeout packs.

Last year's menu additions include deluxe and pita tacos, large fries and a 44-ounce drink. The rollout of chicken burritos in May brought the total number of chicken items to eight.

TACO JOHN'S
$133.1MM

Chicken offerings, introduced systemwide in 1990, and a new line of combo platters are beefing up Cheyenne, Wyo.-based Taco John's sales.

The combos include a taco and enchilada plate; a burrito topped with cheese and chili sauce; a chimichanga platter; a double enchilada; and a sampler platter featuring an enchilada, burrito and taco. Rice, refried beans and nacho chips come with each meal. Rollout of the combos, begun in late '90, is expected to be completed by the end of '91.

EL CHICO
$106.4MM*

Several grilled chicken entrees, including fajitas and a salad, debuted last year. Enchiladas remain El Chico's biggest seller, although the fajitas and other lighter items are coming on strong.

The Dallas-based chain is pairing grilled chicken with enchiladas and other Tex-Mex offerings. El Chico also is testing chicken with various sauces, including a tart tomatillo (green tomato) sauce. And it has dropped fish from the menu.

TACO TIME
$99.0MM

Despite the arrival of Mexi-Meals and quesadilla value platters, Crisp Meat Burritos and Crisp Tacos still top the order list for this Eugene, Ore.-based chain.

Taco Time will add Nachos Deluxe and a few new salad items later this year.

In the last year, the chain has redesigned menu boards to both bolster its suggestive-selling program and increase check averages.

Some franchisees are testing credit cards and delivery.

ACAPULCO RESTAURANTS
$74.0MM

Seafood dishes, now 9% of sales, have spawned a bounty of new entrees. Among them: broiled halibut, crab enchilada, shrimp and vegetable brochette and both scallop and shark fajitas.

Combo platters, which make up a whopping 31% of the Long Beach, Calif.-based chain's sales, include the new Combo Baja. It features a two-item choice of taco, tostada, cheese enchilada, chilies rellenos, beef tamales, flauta or beef taquito, and comes with rice and beans or sautéed vegetables.

RED ONION RESTAURANTS
$55.0MM

Red Onion has halted its menu-add-on binge of recent years. It scaled down entree selections and nonshellfish offerings to cut prep time and get dishes to the table more quickly. The swing is to more basic Mexican cuisine: tacos, burritos and enchiladas.

The fajita line now includes lobster and a combo featuring jumbo shrimp and steak or chicken.

The Carson, Calif.-based chain also is touting nutritional value with a vegetarian line of tostadas, burritos and tacos. A hot and spicy menu section, currently in test, includes Flame Thrower Nachos in a picante sauce. —*B.M.D.*

*R&I estimate

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400: SANDWICHES

CLASSIC CREATIONS ARE BEST SELLERS AT SANDWICH CHAINS

Roast beef, cold-cut compositions and subs keep sandwich sales healthy.

Despite a proliferation of variations on sandwich themes, best-selling sandwiches continue to be originals—the ones that made their makers famous in the first place.

At segment leader Arby's, for instance, roast beef sandwiches top the sales list, even though the chain added more chicken and specialty sandwiches in the past year. Subway's mainstay remains the B.M.T. (bigger, meatier, tastier) classic cold-cut submarine sandwich. Rax, whose menu manipulations have included a hot food bar and chicken sandwiches, still moves more roast beef than anything. And Schlotzsky's The Original still anchors that chain's sales. The sandwich is made with ham, salami, and spiced luncheon meat; three cheeses; and onion, tomato, olives, lettuce and garlic butter on Schlotzsky's signature bread.

Despite the success of these classics, sandwich chains keep trying new strategies. Some are trying to capture business in new dayparts: Subway and Schlotzsky's are using their bread ovens to produce breakfast treats. Others are offering value via smaller items: Blimpie is selling a half-size sandwich for 99 cents.

ARBY'S
$1,430.0MM

After two years in test, Arby's Grilled Chicken Sandwich is a go systemwide. Promotional versions include the Grilled Chicken Cheese Melt with the chain's signature Parmesan sauce, Grilled Chicken Club with cheese and bacon, and a barbecue chicken sandwich. Grilled Chicken Cordon Blue with a German-style mustard is in test as well.

"Our signature sauces, such as the Parmesan cheese sauce, honey mayonnaise and Italian dressing, are what set our sandwiches apart," says Will Fisher, vice president of research and development. Since the April '91 introduction of these sandwiches, sales have exceeded expectations, according to Fisher, but he declined to give figures.

Other new products for the 2,420-unit chain include Arby's Sub Shop, in test in eight markets. The shop offers a selection of Italian, meatball, turkey and roast beef submarine sandwiches on an Italian loaf, with prices ranging from $2.49 to $3.99. "Submarine sandwiches are a natural extension for us," says Fisher. "We have everything we need on premises already, and sales in the sub-sandwich category are on the rise. I think we're pricing them competitively."

Competitive pricing is key to Arby's new value deal, as well. The chain began offering Roast Beef Deluxe, Ham Deluxe and Turkey Deluxe sandwiches for 99 cents each in the spring and will extend the offer through summer.

The Atlanta-based chain also offers a well-known brand of diet salad dressing for its side, garden or roast chicken salads. And this

continued on page 124

Arby's new Roast Chicken Deluxe features chicken breast strips, lettuce, tomato and cholesterol-free mayonnaise.

SANDWICHES
$4.0 billion

3.7% of all
400 commercial sales

TOP TRENDS

▶ Value deals such as smaller sandwiches, discounted sides with sandwich purchase and combination meal deals

▶ Still more salads and light sandwiches made with turkey-based meats and lower-fat mayonnaise

▶ Expansion into airports, colleges, stadiums, military installations

▶ Joint ventures with complementary concepts, such as yogurt shops

COMING UP

▶ Arby's: Arby's Sub Shop, a line of submarine sandwiches sold within regular units

▶ Subway: a roast chicken submarine sandwich, pita sandwiches, breakfast baked goods

▶ Rax: a light line of sandwiches and salads

▶ Blimpie: more baked goods such as cookies, cinnamon rolls and muffins

▶ Schlotzsky's: an 8-inch all-day version of its 12-inch dinner-time pizza

▶ Jerry's Subs & Pizza: California White Pizza that has no tomato sauce

A complete ranking of the 400 by segment begins on page 21.

400: SANDWICHES

continued from page 123

Submarine sandwiches are hot sellers; grilled chicken is still strong.

SUBMARINES RISE TO THE OCCASION

Sub sandwiches are hot. They're surfacing on menus in colleges, hospitals, corporate feeding and the military. Most new food-court concepts for these institutions feature custom delis with a wide selection of classic sandwiches.

Even McDonald's, Burger King and Hardee's are testing submarine sandwiches. To Tony Conza, president of 409-unit Blimpie, that news is good. "The big guys are finally realizing that the submarine sandwich is a fresher, healthier and more mobile alternative to traditional fast food," he says.

But both Subway and Blimpie believe they have little to fear from burger chains that launch sub sandwiches as a sideline. "I don't think a McDonald's or Arby's can make as good a product as a chain that *only* specializes in submarine sandwiches," says Richard Pilchen, vice president of marketing at Subway. "In all, we're happy for the attention McDonald's will bring to our segment."

summer, three sandwiches that have fewer than 300 calories and are 94% fat free (thanks in part to a light mayonnaise) are in test. Roast beef, roast chicken and turkey versions are available.

SUBWAY
$1,100.0MM

Of Subway's most recent menu additions, the Cold Cut Combo, made with turkey-based deli meats, and the Turkey & Bacon Deluxe are the biggest hits with customers. They account for about 15% and 10%, respectively of total systemwide sales.

A grilled chicken breast sandwich currently is in test in about 75 units, and initial response looks good, according to Richard Pilchen, vice president of marketing for the Milford, Conn.-based chain. On the light side, white pita bread and light mayonnaise are in test as well. "We tried a wheat pita some time back, but the product didn't hold up well," says Pilchen. "We thought that was it for pita, but our customers, especially those in the Northeast, keep asking for it, so we're giving it another go."

Subway now uses its bread ovens to produce baked goods such as muffins, Danish and croissants to pick up breakfast business in many units. Juice and coffee are offered as well. "Breakfast will never be a major part of our business," says Pilchen. "But by limiting the menu to easily baked goods, we can supplement sales."

RAX RESTAURANTS
$319.2MM

Rax's Super Saver Menu, which offers nine items in the 99-cent to $1.09 range, accounted for almost 40% of sales when it was in full swing early this year, according to company sources. Selections included 8-1 (eight patties to a pound of beef) sizes of the regular 5-1 size bacon cheeseburger, a roast beef Cheddar melt with sautéed onions, and a barbecue beef sandwich, as well as baked potatoes and cheese-topped nacho chips.

In April '91, the Columbus, Ohio-based company extended its line of sandwiches topped with signature Swiss cheese sauce. The Western Melt, with roast beef, barbecue sauce, Swiss cheese sauce and sautéed onions, sells for $1.99. The Beef, Bacon and Swiss sells for $2.25, and a baked potato with Swiss cheese sauce and bacon bits goes for $1.89. In late 1990, Rax added to its grilled chicken line a Grilled Chicken and Bacon Deluxe sandwich and a Mushroom and Swiss Grilled Chicken sandwich.

This year, Rax plans to add a light line of salads and sandwiches.

BLIMPIE
$117.0MM

Since it began baking bread on premises last year, Blimpie, New York, has the equipment it needs to expand its line of baked goods. "We're developing a chocolate chip cookie and cinnamon roll now, and are thinking about adding muffins to help pick up our morning business in those markets that do or would benefit from opening for breakfast," says Tony Conza, president.

Last year, the chain introduced two new hot sandwiches: a meatball sub and a steak and cheese. They sold well in the winter, but Conza expects demand for the hot products to slow a bit in the summer months. The Blimpie Lites line, a selection of five salads and five sandwiches on pita bread, has shown steady growth, accounting for just under 10% of total sales. Conza believes the more healthful selections show promise, so much so that all sandwiches will be available on pita bread this year.

SCHLOTZSKY'S
$57.0MM

Sales of Schlotzsky's 12-inch, dinner-time pizza have done well enough for the Austin, Texas-based sandwich chain to introduce an 8-inch version that will be available all day. The smaller pizza, with a choice of plain cheese, pepperoni or "the works" (onion, sausage, black olives), will sell for $1.49 to $1.79.

Schlotzsky's also is testing a 16-inch pizza in the Dallas and San Antonio markets. It sells for $5.89 to $7.89, depending on toppings. "We found that two people would come in and split a 12-inch," says Kelly Arnold, director of franchise development. "So we thought a 16-inch would help us keep our check averages up while still allowing customers to split an order."

The chain's Original sandwich on its signature bread continues to be its best seller, but a new grilled chicken breast sandwich served on the bread is expected to sell well, according to Arnold. The chicken sandwich will sell for $2.69.

To offer value, Schlotzsky's is giving patrons price breaks on side items rather than on main courses. The price of soup has been cut to 69 cents from $1.19 to $1.79; dinner salads, from $1.19 to 69 cents; and cookies, 29 cents to 10 cents, all with the purchase of a sandwich. The side-order values have increased check averages by 5%.

Franchisees have found

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400: SANDWICHES

continued from page 124

Sandwich chains are opening shop in airports, arenas and institutions.

new ways to use the signature bread recipe. One operator created a Schlotzsky's muffin, served with cream cheese and butter; others are making croutons, which enhance the overall value of salads, according to Arnold.

JERRY'S SUBS & PIZZA
$43.5MM

Jerry's, Gaithersburg, Md., is best known for its cheese steak sandwiches. Last year, the R&D team created 10 variations on that key theme, all of which had been tested and retested for months. All are based on the signature steak, provolone cheese, mayonnaise, lettuce, tomato and pickle original.

Along came such variations as the Philly Double Cheese Steak, with American cheese added to the provolone; Double Cheese Steak Parmesan; the Bacon Double Cheese Steak; Bacon Double Cheddar; Bacon Double Swiss the Barbecue Bacon Double Cheese—one gets the idea. All sold well in test. The Philly Double Cheese Steak, the best seller of the lot, has been added to the menu permanently, according to Dana Siller, director of marketing. The sandwiches are priced at $3.99, but a dollar more buys a combo meal with fries and a soft drink.

The big news on the dinner-time best seller, pizza, is the introduction of California White Pizza—with a blend of mozzarella, ricotta and Romano cheese. White pizza has no tomato sauce, but relies instead on the cheeses, garlic and toppings of bacon and tomato or fajita chicken for its taste sensation. The pizza, which sells for $4.99 for a 15-inch pie, debuted in June.

MIAMI SUBS
$40.00MM**

Once QSR, Inc., this Fort Lauderdale-based operator of Miami Subs and Mr. Submarine officially has changed its name to Miami Subs and is aggressively taking the name national; it plans to open 103 units in '91. The 17 Mr. Submarines it runs have been converted to Miami Subs, as have the free-standing Taco Viva units (those Taco Vivas located in strip malls were sold off in 1990).

The concept lies somewhere between a T.G.I. Friday's and a fast-food operation, with checks averaging about $5.62, according to a company spokewoman. "We're upscale in terms of the food and decor, but customers order food from the counter and then sit," she says. Customer favorites include cheese steaks, gyros on pita, flame-broiled chicken on pita, and a club sub with turkey, ham, bacon, tomato, onions, lettuce, mayonnaise and a proprietary sauce served on a hero roll. The menu line, however, is not limited to subs and sandwiches. Burgers, chicken wings, salads, frozen yogurt, deli salads and broiled chicken selections are included. "All of our food is fresh, nothing is frozen, and it's all prepared to order," says the spokeswoman.

—Beth Lorenzini

**Company estimate

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For information circle **43**

400: SEAFOOD

SEAFOOD CHAINS HOOK REPEAT BUSINESS WITH VALUE, VARIETY

Good seafood buys help chains stage price-oriented promotions.

Now that the leading seafood chains have adapted their menus to meet customer demand for healthful entrees, they are building loyalty by offering value and variety.

Operators such as Red Lobster and Rusty Pelican are enticing customers with lobster and crab promotions that run when quality products become available at attractive price points.

Coupons remain effective traffic-building tools, but chains also embellish meals with extras to increase value perception. Former a la carte items such as Caesar salad, soup and bread now come with the price of an entree, and often are served all-you-can-eat style.

RED LOBSTER
$1,600.0MM*

The segment leader enhanced the value of its meal package in March by introducing all-you-can-eat hot cheese garlic bread and Caesar salad. Servers deliver the bread to the table in hot serving pans. The Caesar salad in particular has been a big hit with customers, and drives home value, says company spokesman Dick Monroe.

The menu, revised earlier this year, includes eight new combination meal platters. The popular "Ultimate Feast" meal package, for instance, includes a rock lobster tail, a half-pound of snow crab legs, fried shrimp and broiled shrimp scampi.

Red Lobster now puts a fresh market sheet, once listed on a blackboard at the front of the restaurant, in the menu itself. The sheet highlights selections of the day and separates the entrees by cooking styles—blackened, broiled, fried, sautéed and baked.

To compete with fast-food value menus at midday, Red Lobster offers a $3.99 lunch special. For instance, the shrimp and scampi special comes with soup, salad, starch, vegetable and bread.

The Orlando, Fla.-based chain also emphasized value in its king crab promo, which ran last fall. The chain negotiated a "great price" on crab caught in Russian waters by Alaskan fishermen, says Monroe, and was able to offer a lower price to customers. A king crab, fried shrimp and shrimp scampi trio sold for $11.99. One pound of king

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Red Lobster adds value with hot cheese garlic bread.

SEAFOOD
$3.3 billion
3.1% of all
400 commercial sales

TOP TRENDS

- Fast-food chains add value by promoting meal packages. At full-service seafood chains, brunch specials and "extras" such as hot bread and all-you-can-eat salads add value to the menu.
- Fried food still sells the best, despite heavy emphasis on healthful cooking techniques such as broiling and baking.
- Seafood consumption remains steady—15.5 pounds per capita, down 0.1 pound from 1989, according to the National Fisheries Institute.
- Southwestern- and Caribbean-style seafood recipes offer variety and match current taste trends.

A complete ranking of the 400 by segment begins on page 21.

*R&I estimate

400: SEAFOOD

continued from page 129

Captain D's new broiled fish, seafood and chicken account for 17% of sales.

VALUE STRATEGIES

Rusty Pelican is promoting low-priced lunches served in the lounge area. Priced from $3.95 to $5.95, the deli sandwiches, clam chowder, pasta and luncheon salads are guaranteed ready in seven minutes. Since lounge service began, units are doing 25% to 30% more lunch business.

To increase value perception, Long John Silver's offers an additional piece of fish or chicken to any meal for 69 cents. Also, a two-piece fish dinner with french fries is selling for $1.99.

To bolster sales, especially in shopping malls, Arthur Treacher's is rolling out a children's meal this summer. A choice of fish, chicken or Krunch Pup (similar to a corn dog) and chips, a hush puppy, and a small drink are served in a cardboard classic convertible car for $2.69.

To improve the visibility of its takeout program, L&N Seafood Grill operators pack Southern biscuits in a bakery box and deliver them free of charge to five or six local businesses daily.

—

crab was offered for $14.99. Or customers could buy 1½ pounds of king crab for $19.99.

LONG JOHN SILVER'S SEAFOOD SHOPPES
$781.6MM**

Long John Silver's introduced a major line of baked menu items in 1990 with the intention of making it the fabric of its business. Baked fish is available with light paprika- or lemon-seasoned breadcrumb coating. Baked chicken, too, appears in salads and sandwiches or alone as an entree. The baked line accounted for 10% of the Lexington, Ky.-based chain's business as of May.

To improve its nutritional profile, LJS now offers 2% milk instead of whole milk and a national brand of low-fat and low-calorie salad dressings and sugar substitutes.

Batter-fried shrimp still accounts for 50% of sales.

CAPTAIN D'S
$412.1MM

To increase guest counts, Nashville, Tenn.-based Captain D's has introduced lower-priced lunches and dinners.

A Southern-style fish dinner for $2.99 features fish with a salt-and-pepper cracker-meal breading and comes with french fries, coleslaw and hush puppies. The dinner now accounts for 10% to 14% of sales. A popular five-piece shrimp dinner is priced at $1.99.

In February, Captain D's rolled out its "Captain's Grille," also aimed at broadening appeal. Broiled items include orange roughy, chicken and shrimp priced from $3.99 to $4.99. Served on a bed of rice, these dinners include salad, breadstick and choice of vegetable. The broiled items already account for 17% of sales. The chain is testing blackened chicken, redfish, tuna and grouper.

SKIPPER'S
$101.2MM

Skipper's, now owned by Pizza Hut franchisee National Pizza, is testing baked fish entrees. It also plans to boost check averages by offering individually priced appetizers.

The Bellevue, Wash.-based chain expects its ongoing remodeling program to increase customer counts 15% to 20%. Skipper's projects that the addition of drive-thru windows will increase carryout business to 40% to 50% from 18% of sales.

L&N SEAFOOD GRILL
$78.8MM

Mesquite-grilled fish still is the mainstay of this Mobile, Ala.-based chain. Culinary Director Alan Lamoureux has been testing lighter items, such as dinner salads topped with grilled fish, to improve menu variety.

New to the menu are a marinated lemon-herb chicken breast, herbed salmon fettuccine and barbecued shrimp items.

During the spring, a successful lobster promotion featured six menu items. As an appetizer, a lobster puff (won ton filled with cream cheese, lobster and celery served with apricot strawberry sauce) sold for $3.95. Lobster bisque was offered for $2.25 a cup and $3.25 a bowl. Entrees included lobster and shrimp Newburg for $8.95; chilled curried lobster, fruit salad and muffin for $8.95; and grilled sea bass with champagne lobster sauce for $11.95.

RUSTY PELICAN RESTAURANTS
$76.3MM

When quality products become available at attractive price points, Rusty Pelican, San Juan Capistrano, Calif., takes advantage of them and offers such promotions as its Lobster Revolution.

On Tuesday, Wednesday and Thursday nights from May 1 through July 4, the 32-unit chain offered a 1¼-pound whole Maine lobster dinner for $12.99. For $3 more, guests could add a 7-ounce sirloin steak. Two lobsters were offered for $19.99.

To build dinner business between 4:30 and 6:30, Rusty Pelican now serves a Sunset Dinner, featuring a choice of eight to 10 beef, chicken, finfish and shellfish entrees, priced from $8.95 to $9.95. To increase check averages during the Sunset Dinner, the chain offers specially priced appetizers, such as a shrimp cocktail for $1.95. A direct-mail piece promoting the dinner has helped increase early-evening traffic counts by as much as 50%, says Vice President of Marketing Mike Morehead.

LEGAL SEA FOODS
$52.0MM

The Berkowitz family, owner of Legal Sea Foods, is trying to hold the line on menu prices and increase check averages through suggestive selling.

To add value, the chain is serving clam chowder and salad, previously al a carte items, as part of the meal package.

The Allston, Mass.-based chain is using underutilized Jonah crab, which is found 1,000 feet down on the Continental Shelf. It is similar to stone crab, but the shell is not as thick. Its main benefit is year-round availability. Legal Sea Foods serves Jonah crab chilled, cracked and in casseroles.

—Jeff Weinstein

**Company estimate

400: RETAIL

C-STORES/ RETAIL $2.2 billion 2.0% of all 400 commercial sales

TREND TRENDS

▶ C-stores: Offering more fresh fruit and other convenient, healthful snacks such as carrot and celery sticks

▶ Discount stores: Swinging away from cafeteria-style steam tables to "express" grill units

▶ Department stores: Converting to smaller sit-down units serving lighter fare

▶ Variety stores: Serving more hot meals such as turkey and meatloaf dinners

BEST SELLERS

▶ Grilled chicken

▶ Hamburgers, hot dogs

▶ Frozen yogurt

BEST PROMOS

▶ Target's Kids for Saving the Earth Fun Meal promo sold 500,000 meals from September to January

▶ Casey's General Store's Buy One, Get One Free pizza

A complete ranking of the 400 by segment begins on page 21.

LIGHT MENUS HELP RETAILERS WEATHER OUTSIDE COMPETITION

Salads and breakfasts lure discount- and convenience-store customers.

Retail Goliaths are sparking customer curiosity with light and healthful menus. For instance, Nordstrom's hottest sandwich, a triple-decker Canadian Club (made with Canadian bacon) has been the best seller at all of the chain's 41 cafes since it debuted early last year.

The upscale, service-oriented chain also features Cobb, sesame and Oriental chicken salads. Grilled chicken pockets with chutney and vegetarian pizzas and sandwiches are among future additions.

Discount stores such as Target are swinging to food courts featuring grilled, bakery, pizza, Mexican and other offerings. K mart is developing whole-grain breads and buns, hand-dipped yogurt, and low-calorie, fat-free ice cream.

7-ELEVEN
$731.7MM

Dallas-based 7-Eleven is concentrating on upgrading its image among health-conscious consumers. Fresh fruit is a big seller, and 7-Eleven is looking for more ready-to-eat snacks such as carrot and celery sticks, and chocolate-flavored diet shakes.

The chain is rolling out Fresh To Go chef, garden and chicken salads this summer. It is also testing new deli packaging, designed to perk up value perception.

The chain, which emerged in March from Chapter 11, also has added pizza.

K MART
$326.0MM

Troy, Mich.-based K mart is converting its stores' steam-table cafeterias to Eatery Express, a 50- to 60-seat grill operation located near the stores' entrance. So far, it has completed 150 units.

Last year, the chain added hand-dipped frozen yogurt. Plans for this year include a grilled chicken sandwich on a whole-grain bun, and fat-free ice cream.

The 1,800-store company, which has been testing Little Caesars units in eight stores since last year, will put the concept in 400 stores by year-end.

CASEY'S GENERAL STORE
$46.5MM**

Although pizza is 50% of sales at Des Moines, Iowa-based Casey's General Store, the chain is focusing on expanding its sandwich line. Its most recent addition is a pork tenderloin sandwich. Breakfast sandwiches with egg and ham or sausage were introduced in May.

The chain is testing a breakfast pizza, as well as chicken- and tuna-salad sandwiches. *—B.M.D.*

Retail foodservice outlets are offering more convenient, ready-to-eat menu items.

** company estimate

400: CAFETERIAS

CAFETERIAS
$1.8 billion

1.7% of all
400 commercial sales

TOP TRENDS

- Takeout menus and separate takeout windows—successful for some, not for others
- Casual-dining concepts to supplement cafeterias
- A scaled-down grill menu at the casual outlets
- Design upgrades at older outlets
- Frequent-diner discounts

COMING UP

- Old Country Buffet: a stepped-up advertising campaign
- Morrison's: More catering
- Furr's: Opening more casual-dining outlets
- King's Table: a larger catering and banquet business

BEST SELLERS

- Grilled and fried chicken
- Broiled fish, seafood
- Roast beef, chopped steak

NEW CONCEPTS

- Wyatt Cafeterias: converted less-profitable units into Blue Ribbon Buffet
- Piccadilly: started Classic American Dinner series
- Furr's: opened Zoo-Kini's, a contemporary buffet

A complete ranking of the 400 by segment begins on page 21.

CHAINS BUCK TRADITION, BRANCH INTO CASUAL DINING

Takeout items and frequent-diner discounts keep patrons coming back.

With other segments targeting the value-minded consumer, cafeterias—long the marketers of traditional food at low cost—got more competition than they bargained for last year.

Takeout shops, design upgrades and frequent-customer discounts are just a few of the changes that cafeterias are making to keep their patrons coming back. In addition, chains are branching out and opening more casual modern-dining concepts.

Several cafeteria chains also are looking toward catering for additional sales.

MORRISON'S FAMILY DINING
$397.0MM

Although parent company Morrison Inc. is putting more energy into its casual-dining concepts, such as Ruby Tuesday, Morrison's Family Dining saw an increase of nearly 8% in sales last year and continues to lead the cafeteria segment.

The biggest change for the Mobile, Ala.-based company in 1990 was an organizational one. Morrison divided its family division into two large regions—Southern and Northern—increasing the number of units each district manager supervises.

Menus at the cafeterias saw minor adjustments; for example, new entree salads, more fruit in the salad bar and new seafood items. To its main lineup of prepared-from-scratch traditional food, Morrison's added combination meals for a fixed price in 1990 and set up takeout shops in many locations.

The company has raised prices slightly to offset minimum-wage hikes and higher food costs. Other profit-gaining moves include trying to get tour buses to stop at Morrison's and increasing catering efforts.

LUBY'S CAFETERIAS
$320.0MM

Luby's continues to tear up the South, growing at an an-

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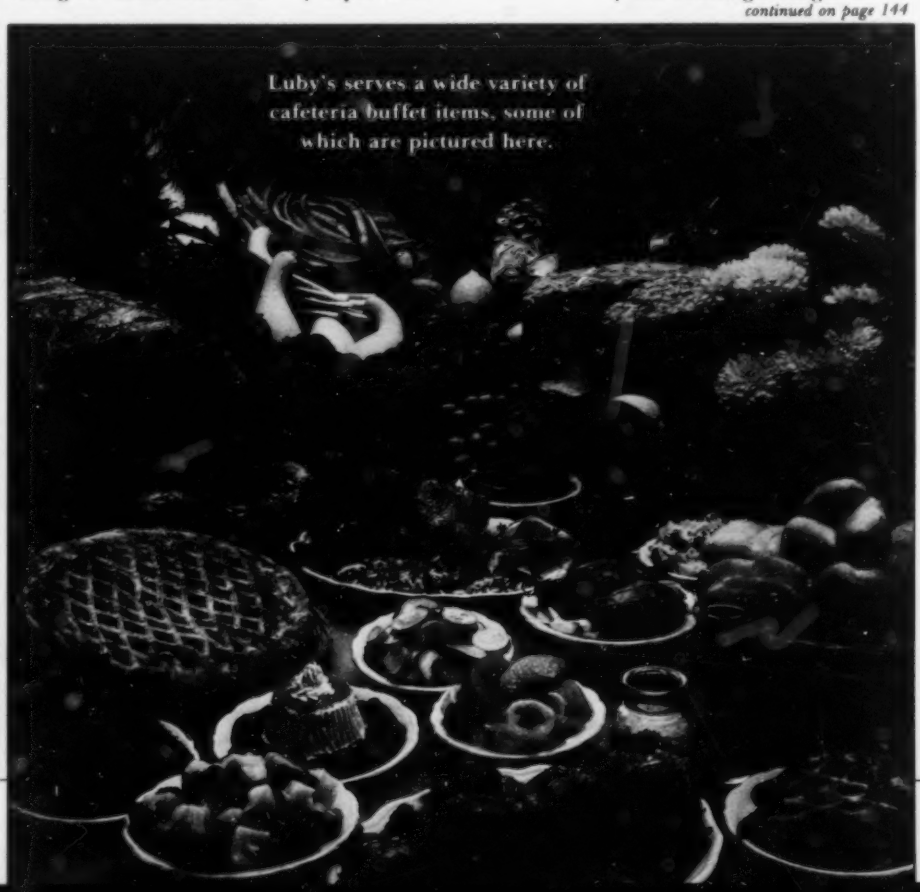


Luby's serves a wide variety of cafeteria buffet items, some of which are pictured here.

400: CAFETERIAS

continued from page 138

Cafeterias are going for a flashier, more contemporary interior design.

BEYOND BUFFETS

Cafeterias are packaging and marketing their offerings in new and combined ways. Some chains choose to highlight this trend and some don't, but most find it useful as value menus become more important to customers. A few examples follow.

Morrison's began selling combination meals at a fixed price in 1990 and set up takeout shops in many locations.

Furr's debuted an all-you-can-eat menu in its restaurants in 1990 and has opened a new buffet concept, Zoo-Kini's, which permits no smoking, emphasizes nutrition and uses only biodegradable/recyclable products.

Luby's buffet offers complete dinners. Last year the chain remodeled about half its units to include separate entrances for takeout.

Wyatt's converted some less-profitable units to Blue Ribbon Buffets, a buffet-style cafeteria with no service help.

nual rate of 10% in the last eight years and adding 14 new locations this year. Called by *Forbes* magazine "one of the 200 Best Small Companies in America," the San Antonio-based company plans further growth in the coming year.

Luby's expanded its food-to-go business in 1990 by installing separate takeout entrances in half its units. One of the few major cafeteria chains that hasn't strayed from its segment to open casual-dining concepts, Luby's appears content with its cafeteria concept for now.

The company increased menu prices twice over the past year, but says it also improved food quality. Luby's offers salads, vegetables, hot entrees and desserts.

FURR'S/BISHOP'S CAFETERIAS
$282.9MM

Lubbock, Texas-based Furr's had a busy year developing its specialty-concept restaurants. The opening of the first Zoo-Kini's, a contemporary buffet, gave Furr's an interesting twist for first-quarter 1991.

Zoo-Kini's, marketed with an emphasis on nutrition, doesn't allow smoking and uses only biodegradable and recyclable products. Ken Turner, advertising and marketing director, says the concept, which serves soups, salads and grilled items, is doing remarkably well. The company also has opened its first Tijuana Surfside outlet, a casual concept with a limited menu stressing alcohol sales.

Furr's also implemented an all-you-can-eat menu in 1990, built drive-thrus in two units and finished setting up a credit card payment system. In addition, the company has begun a frequent-diner program, with bonus pack certificates for future meals and coupons for specially priced items.

PICCADILLY CAFETERIAS
$280.0MM**

Baton Rouge, La.-based Piccadilly recently introduced its Classic American Dinner series with 10 to 12 featured entrees daily. The company is offering the series in response to research that shows customers' desire for a complete dinner at a set price. The meals include an entree, salad, two vegetables, beverage, bread and dessert.

WYATT CAFETERIAS
$194.0MM

Two new restaurant concepts made 1990 a big year for Dallas-based Wyatt. The first was the conversion of less-profitable units to Blue Ribbon Buffets, a buffet-style cafeteria with no service help. The menu items remain almost exactly the same, according to Kenneth Nutt, operations director.

The company also opened the first mini-Wyatt's, a 4,000-square-foot, 150-seat cafeteria with a scaled-down menu. Nutt says Wyatt plans to introduce these in small towns across Texas with populations between 20,000 and 25,000.

KING'S TABLE BUFFETS
$85.0MM

On March 5, Bellevue, Wash.-based King's Table was purchased from Horn & Hardart by Heller Financial Corp. Heller plans to upgrade the business, and resell the company in a few years.

Most units are receiving a minor remodel, but the general format is not changing much. King's Table tested takeout last year, but it was not successful, executives say.

King's Table is reorganizing its catering and banquet business, which accounts for about 2% of sales. The new owners are providing corporate support to help units start up catering and banquet departments.

MCL CAFETERIAS
$46.8MM*

Indianapolis-based MCL, keeping in mind its advertising tagline, "Good Common Sense Nutrition," expanded its takeout menu to include healthful products last year. Vice President of Marketing Mark Lawrence says the revised takeout menu features new items in each meal category as well as a more contemporary graphics display.

In 1990 MCL added a Cobb salad, several fruit salads and an Italian salad to its buffet menu. Other new items included Brussels sprouts and oven-baked chicken. The chain also improved its fried chicken recipe and took the sauce off its meatloaf entrees, giving the customer the option of ordering.

ROYAL FORK BUFFET RESTAURANTS
$32.0MM

Boise, Idaho-based Royal Fork is in the process of incorporating a takeout menu at all its units. It already provides containers for takeout and brochures to let customers know about the new concept. The company also advertises with local businesses.

Royal Fork focused on cost-efficiency in 1990, distributing to its operators a list of 1,500 ways to save money in restaurant operations. Cutting back on out-of-store promotions, sponsoring community athletic programs and checking garbage for possible recyclables are just a few of the ideas.

—N.P.

*R&I estimate; **company estimate

400: LODGING

HOTELS PUT FOODSERVICE SPOTLIGHT ON LOCAL CUISINES

Regional tastes, healthful preparation and *sous-vide* drive lodging trends.

Many hotel food and beverage operators struck a chord last year with guests and local residents alike by tailoring their main restaurant to regional tastes.

Omni Hotels took this approach in two of its hotels. The Louis Charleston Grill in the Omni Hotel Charleston Place, Charleston, S.C., blends the historic influences that Britain, France, the West Indies and Africa have had on local food tastes. In Philadelphia, Azalea chefs purchase many ingredients from small farms just outside the city and combine them in such dishes as Pennsylvania Dutch chicken corn soup, Eastern Shore crab cakes with 10-vegetable slaw, and rabbit pot pie with garden vegetables and buttermilk-Cheddar biscuits.

Holiday Inn Worldwide, Atlanta, introduced two new concepts, a steakhouse/grill and a seafood restaurant, and both are adaptable to the culinary climate around the hotel. Each concept has a core menu, but certain menu items vary from market to market according to local tastes, says Martin O'Dowd, director of F&B services, the Americas.

Noting the nationwide consumer trend for more healthful food, corporate F&B executives at Doral Hotels & Resorts have included spa cuisine in all of the chain's New York hotel restaurants. Radisson Hotels is working with the Culinary Institute of America, Hyde Park, N.Y., on reformulating its recipes for better nutrition.

Banquet and catering operations mirror the nutritional trend. Many new items, including some vegetarian recipes, provide meeting planners with variety.

After much testing, many companies are rolling out products prepared in the *sous-vide* method: Food is vacuum packed and cooked, then frozen or chilled, and finally heated and finished in a hot-water bath. Chefs in six Omni hotels use *sous-vide* foods on their 24-hour room-service menus; late-night customers choose from more elaborate foods than ever before.

The Marble Works in the Hyatt at Fisherman's Wharf offers Italian seafood and pasta.

MARRIOTT LODGING DIVISION
$1363.4MM*

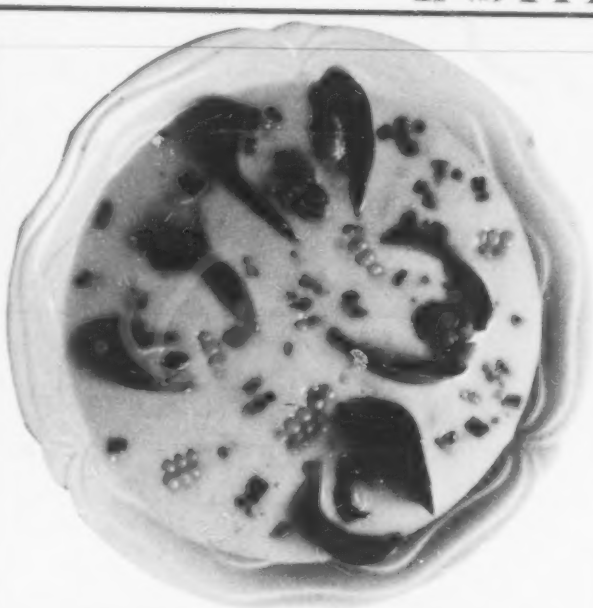
Lunch-time customers combine grazing and a concern for healthful dining, according to Bill Hulbert, vice president of hotel F&B for the Washington-based company. Because these diners tend to order an assortment of appetizers and side orders, Marriott is adding more of both to restaurant menus.

Salads are more popular than ever, he says. To add variety and keep customers excited about eating salads, the pressure is on to find more sophisticated ingredient mixtures and presentations. "We're doing more combinations of salads with poultry and seafood," he says. "Grilled items are big, as are more complex greens," he adds, referring to more than the standard head lettuce salad foundation.

Despite these bows to healthful dining, Hulbert says fried shrimp, calamari, potato skins and french fries are as popular as ever.

Marriott serves *sous-vide* items in about 25% of its hotels, says Hulbert. The menus in each of these hotels generally offer two or three different *sous-vide*

*R&I estimate



Doral's Saturnia Restaurant stresses low-calorie, low-fat fare, such as sweet corn, clam and mussel soup.

items. The company offers many more, and the lineup expands as Marriott's supplier is able to convert existing recipes to this new technology. The most common vacuum-sealed-and-cooked products throughout the company's hotels include salmon in dill sauce, marinated chicken, rack of lamb, London broil and swordfish.

HYATT HOTELS
$912.8MM*
The "less is more" philosophy is close to the heart of Robert Dallain, new vice president of F&B at the Chicago-based hotel chain. Dallain is re-evaluating portion sizes of menu items. Rather than providing more food than the customer actually wants, he is looking to eliminate waste. "For instance, where we might be putting 4 ounces of meat on a sandwich, we might scale it down to 3 ounces," he says.

One of the company's latest concepts is the Marble Works in the Hyatt a Fisherman's Wharf, San Francisco. The 124-seat restaurant features Italian seafood and pasta dishes.

As a prelude to next summer's Olympics in Barcelona, Spain, Hyatt will promote Spanish food and wine this fall. An expanded version of the promotion will take place next year as a more timely tie-in.

HOLIDAY INN WORLDWIDE
$869.0MM*
Despite all the talk light cuisine is getting, T-bone steaks remain the best selling menu item throughout the Atlanta-based chain, according to O'Dowd. "Lighter fare does much better in our big-city properties, but in our secondary city hotels, beef is still in big demand," he says.

On the beverage side of F&B, so far this year, banquet wine sales are up by 10% to 12% over last year, says O'Dowd. Two factors contribute to the upswing, he says: One is that banquet organizers are becoming less intimidated by liability scare tactics from anti-drunk-driving groups. The other is that people are taking more responsibility for their own actions—many feel a glass or two of wine with dinner is perfectly acceptable.

RADISSON HOTELS
$380.0MM
Radisson's dietary program with the Culinary Institute of America rolls out chain-wide this summer. The program weaves health and nutrition into all of Radisson's three-meal and specialty restaurants; franchisees now can take advantage of the results, says Don Clawson, vice president of F&B.

The program reduces cholesterol and sodium in recipes and increases levels of proteins and minerals. Customers eating food prepared with the new recipes will take in only between 850 and 1,000 calories for the entire meal, says Clawson. "We're modifying our recipes from A to Z, from appetizers to desserts" he says.

A software package accompanying the new recipes allows chefs to print out a 19-point breakdown that includes content levels of sodium, three types of fats, cholesterol and various minerals and proteins. "Our studies show that 60% of our customers want to eat more healthfully, but don't know how to do it. Our new system shows them how," says Clawson.

Chefs at the Minneapolis-based chain's 30 managed properties already have been trained in the program.

After three years of product development, two California properties have rolled out full *sous-vide* menus. Approximately 85% of the menu is prepared from vacuum-bagged-and-cooked products; much of the remaining 15% is lettuce and other garnishes, says Clawson. "We've found that the benefits of *sous-vide* don't really pan out unless at least 65% of the menu is prepared this way," he says. In these two properties, *sous-vide* has helped cut food costs by 2% and labor costs by 3.5%, Clawson says.

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LODGING
$12.4 billion

11.5% of all
400 commercial sales

TOP TRENDS

- Increased focus on local cuisines
- Accenting healthful and nutritious ingredients and preparation techniques
- Increasing sophistication of salads, both in ingredients and presentation
- Rolling out *sous-vide* menu items
- Boosting takeout sales with innovative approaches

COMING UP:

- More local meal deliveries, especially office lunches

BEST SELLERS

- Holiday Inn Worldwide: T-bone steak
- Radisson Hotels: Beef and seafood
- Red Lion: Steaks and prime rib
- Omni Hotels: Chicken, fish and salad entrees

A complete ranking of the 400 by segment begins on page 21.

400: LODGING

continued from page 147

Sous-vide foods on room service menus allow full meals at all hours.

RED LION
$146.0MM
In step with the current trend of casualization, the Vancouver, Wash.-based chain recently opened Brickstones restaurant in one of its Portland, Ore., properties.

Brickstones is more casual than either Maxi's or Misty's, the chain's two upscale concepts. The all-day menu features such items as blackened chicken breast and grilled lamb salads, flame-broiled prawns, and mesquite-roasted chicken.

While most Red Lion hotels offer a lounge separate from the dining room, Brickstones combines the two, a display kitchen adds to the excitement. Future development of more Brickstones depends on results from market research studies currently under way.

Chainwide, the four most popular dinner menu items, except at Brickstones, are Steak Diane, shrimp scampi, Caesar salad and spinach salad with hot bacon dressing. All are prepared tableside.

OMNI HOTELS
$119.2MM
"Unused space made profitable" is adding to several Omni Hotels' F&B revenues by boosting takeout sales, says Peter Hothorn, senior vice president of F&B for the Hampton, N.H.-based company.

For example, management of the Omni Shoreham in Washington converted a coatroom in a high-traffic lobby area last year to a small takeout area called Little Something. At first, Little Something employees sold only such breakfast items as coffee and Danish, but when management took down a wall and converted another adjacent, unused room, the menu expanded to include packaged cold lunch and dinner items. These include salads, pastas and sandwiches. Little Something now generates $1,300 to $1,500 a day in sales.

Going takeout one better, the Omni Netherland Plaza in Cincinnati offers Omni Edibles, which delivers lunches to office buildings within a five-block radius. Customers, whether single diners or groups, choose selections from the restaurant's menu, then fax or phone in their orders. For large meetings planned in advance, Omni Edibles employees set up a complete on-site luncheon. The program generates approximately $200,000 a year, says Hothorn.

FAIRMONT HOTELS
$66.3MM
Because sales were slumping at the Squire Restaurant in the San Francisco-based chain's flagship hotel, Corporate F&B Director Ernesto Brandner studied other area hotels for a niche to fill. Brandner finally decided on a seafood menu to replace one that featured California cuisine with a French accent. Brandner's homework has paid off—sales are up 30% over last year.

The Squire's menu divides its fish entrees by regions: for instance, broiled tuna or abalone sautéed with almonds from the Pacific; broiled salmon with champagne sabayon from the Atlantic; and crawfish étouffé or red snapper with tomato salsa and basil from the Gulf of Mexico.

Sunday brunch business at the New Orleans property has increased by 25% since the addition of omelet, carving and seafood service stations in the dining room. No extra labor was needed, since all of these functions would have been taken care of in the kitchen, says Brandner. "We just brought the show out into the dining room," he says.

DORAL HOTELS & RESORTS
$45.0MM
When the New York-based company opened the Doral Saturnia International Spa Resort in Miami three years ago, it introduced a complete line of healthful menu items—low in fat, high in carbohydrates and with monitored levels of proteins, calories and sodium. When many of the resort's guests expressed their desire for similar food offerings back home in other restaurants, management changed the restaurant in New York's Doral Park Avenue Hotel from a casual bistro to the upscale Saturnia Restaurant.

An entire meal at Saturnia, from appetizer to dessert, has less than 750 calories and 20 grams of fat, says Mark Shuda, vice president of F&B. Appetizers include a "beggar's purse" of chicken, bean sprouts and bell peppers with a mustard chive sauce, and Maine lobster consommé with garden root vegetables. The entree menu features grilled medallions of lamb with tomatoed white beans and roasted garlic sauce, and seared paillard of veal with ratatouille and Roquefort sauce. Saturnia Restaurant's most popular entree is shelled Maine lobster sautéed with tomato, basil and garlic, served with whole-wheat fettuccine and grated Parmesan cheese.

A number of Saturnia Restaurant offerings appear on the restaurant menus in Doral's other three New York properties.

—Rob Townsend

BETTER BANQUETS

Banquet guests at **Doral Hotels & Resorts** have a luxury not often found in large foodservice settings: choice. Rather than getting one more plate of whatever everyone else is having, Doral banquet diners, in groups of up to 200, have a choice upon seating of three different items. Mark Shuda, vice president of F&B, says that it is not difficult to provide this type of last-minute variety for groups of this size. "And by setting one price for all three items, we make more money on the lower-cost item in the bunch, while covering our costs on the most expensive one," he says.

Banquet food at **Fairmont Hotels** is prepared and plated to provide guests with the same taste and eye appeal as similar meals from the chain's restaurants, says Ernesto Brandner, corporate F&B director. "We enhance our banquet meals with seasonal vegetables and sauces, providing not only good taste, but the right balance of color and contrast between items on the plate."

400: CONTRACTORS

NEW CONCEPTS PROVE THAT PERSONAL SERVICE SELLS

Made to order, wrapped to go or delivered—clients want it their way.

Almost without exception, the latest in-house contract management concepts emphasize the personalized, convenient service aspect today's institutional customer have come to expect from *commercial* operations. These include everything from exhibition cookery, made-to-order sandwiches and deskside delivery to mobile carts, in-house bakeshops with takeout offerings, and convenience stores that sell food and sundries.

Flexibility and choice are the buzzwords in contract management. No two clients are alike, say contractors, and whether the client views foodservice as an inconvenient expense or a beneficial perk, contractors will deliver a program to suit specific needs. Licensing agreements with national chains have worked even better than expected to keep clients in house during meal periods, and more linkups will come.

Contractors are finding that organization by line of business rather than by region tells the client that the contractor is committed to the segment, such as education or B&I, and thus the client's individual needs. For instance, both Marriott Management Services and Service America reorganized along lines of business—this move helped the companies "right size" as well as provide better service to clients.

ARA SERVICES
$2,700.0MM

ARA's in-house Allegro pasta concept and Leghorn's chicken line debuted last year, and while both are doing well in sales, the Allegro line is showing exceptional promise, according to Tita Cherrier, public relations specialist. "The Allegro line is catching on as fast as our best-selling Itza Pizza concept did when it was launched," she says. This year, the Philadelphia-based company plans to introduce a wok cooking concept, called the Wokery.

ARA has begun preparing for the 1992 Summer Olympics in Barcelona, Spain. It marks the company's eighth appearance as the games' official foodservice manager. This time, the company will manage foodservice for about 15,000 athletes as well as oversee 300 foodservice outlets for the 4 million spectators expected to attend.

MARRIOTT MANAGEMENT SERVICES
$2,700.0MM

By appointing five presidents to oversee the five major lines of business (health care, B&I, education, schools and facilities management), Marriott, Washington, hopes to improve service and communication. "We realize that the health-care industry faces different issues and operational policies than the college market, for example," says Chuck O'Dell, executive vice president and general manager. "Each of our presidents will have the opportunity to immerse themselves and their teams in their specific segment, to truly learn the needs, concerns and preferences of each segment's customers."

And since customer preferences differ, Marriott, like its competitors, knows that success lies in letting them make choices. In addition to its own in-house concepts, tie-ins with such national brands as Pizza Hut, Nathan's Famous Hot Dogs, Dunkin' Donuts and Mrs. Fields are increasing—Marriott will add yet-to-be-named yogurt chain to the lineup this summer.

In-house branding has taken on a regional aspect—new offerings include Tacoria, which offers Southwestern fare, and Pacific Northwest specialties. Slated for rollout this year: Pasta Pronto, a display cooking

RestauraMart, one of Restaura's three newest concepts, offers prepared foods, such as roast chicken and sandwiches, in a c-store setting.

The Wood Company is expanding its Stack's Deli line with panini, Italian cold-cut sandwiches on baguettes.

concept; Mongolian Fire Pot, a Chinese stir-fry; and gourmet salad bars.

CANTEEN
$1,370.0MM

Canteen continues to update its Saturn II line of in-house brands. New this year are display cooking stations for custom stir-fry and pasta preparation, a sandwich concept with upscale and "down-home" lines, and a phase-in of more fresh foods and phase-out of convenience products. The Spartanburg, S.C.-based contractor is testing a proprietary chicken product and three signature fish entrees.

Licensing agreements with Pizza Hut and Taco Bell continue, and Canteen is considering additional links with Subway, Hardee's and Long John Silver's. Of the in-house brands, Pazzelli's Pizza and Classic Cookies are far and away the most popular, according to Carl Anderson, national director of sales and marketing.

"I think that traditional cafeteria-style service is on its way out," says Anderson. "Most of our customers are asking for the food-court approach to foodservice." Canteen considers health care, corrections and education the segments of growth in terms of new business for foodservice.

Canteen also is developing a new national sales department to serve clients who run facilities around the country.

SERVICE AMERICA
$1,100.0MM

While many of the large contract management companies are joining the branding trend with national chains, Service America is branding with products from major manufacturers, most often those that lead in market share for their product. Special Programs in Culinary Entertainment (S.P.I.C.E.) involves 12-month promotions built around name-brand products that customers recognize as quality products.

The program is two years old, but it continues to exceed Service America's expectations in terms of sales, according to Tighe Merkert, vice president of marketing for the Stamford, Conn.-based contractor. "Accounts that market the S.P.I.C.E. program well see at least a 10% increase in sales," he says.

Name-brand manufacturer products are the key to a new refrigerated-vending program as well. Deals have been made with well-known manufacturers of such items as burgers, sausage patties, grilled chicken and chicken wings to market their products through cold-vending machines. Customers can buy and microwave the products on site. "A lot of companies in our industry have not done well with refrigerated vending," says Merkert. "We think brand-name products are the key, and our initial tests in 50 accounts have seen outstanding results."

Service America is rolling out its first in-house branded concept, Pizzamoré (a registered trademark) in recreation, B&I and college accounts. The pizzas come in 7- and 16-inch sizes, in plain, pepperoni and supreme (onions, sausage, pepperoni, green pepper). One Kansas City, Mo., recreation account saw a 500% increase in pizza sales when the Pizzamoré product replaced a convenience pizza product the operation had been selling. Twelve more variations will be rolled out within the next year.

The company plans more in-house branded concepts, but it declines to give details.

MORRISON'S CUSTOM MANAGEMENT
$602.0MM

Morrison's is going full force after catering business in Los Angeles. Following the success of its City Events catering center, which also supplies lunches to corporations that don't have foodservice facilities, the Mobile, Ala.-based company purchased Parties Plus, one of the premier catering firms

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CONTRACTORS
$12.2 billion

9.1% of all
400 sales

TOP TRENDS

- ▶ Overseeing accounts by line of business (health care, education, B&I, etc.) rather than geographic region
- ▶ Licensing agreements with national chains and national brands of consumer goods
- ▶ Exhibition cooking
- ▶ Convenience stores
- ▶ Mobile food carts
- ▶ Formal promotions-planning programs
- ▶ More use of fresh product, less use of convenience products
- ▶ Nutritional dining and fitness programs

BEST PROMOTIONS

- ▶ Sale of pies, candies, cookies, turkeys and honey baked hams on holidays
- ▶ Special price deals on takeout foods and combination meals
- ▶ Ethnic themes such as Oriental holidays, Italian feasts and Mexican fiestas
- ▶ Contests and giveaways such as winning a pizza party for friends in the office or residence hall
- ▶ Daily or weekly tie-ins with special occasions such as sports finals, celebrity birthdays and historical events

A complete ranking of the 400 by segment begins on page 21.

400: CONTRACTORS

continued from page 153

Hot trends include exhibition cooking, mobile carts and national brands.

THE BRAND-NAME GAME

Clients are calling for nationally recognized chains, and contract management companies are happy to provide the option. Most contractors report that sales and profits rise when a national brand is on the scene. Here are some of the contractor-chain alliances:

ARA Services: Pizza Hut, Domino's, Dunkin' Donuts, Taco Bell; negotiating with I Can't Believe It's Yogurt, TCBY, KFC.

Marriott Management Services: Dunkin' Donuts, Domino's, Nathan's Famous, Pizza Hut, Mrs. Fields; negotiating with an undisclosed yogurt chain.

Canteen: Pizza Hut, Taco Bell; negotiating with Subway, Hardee's, Long John Silver's.

Morrison's Custom Management: Dunkin' Donuts, I Can't Believe It's Yogurt, McDonald's, Baskin-Robbins; negotiating with Pizza Hut.

in the area, with more than 500 clients. Chances are City Events will take on the well-known Parties Plus name soon. Catering business in large metropolitan areas on both coasts is a growth area, according to Helen Gattuso, director of marketing.

One of Morrison's most successful ideas was its Theme Pleaser Calendar, says Gattuso. The 16-x-20-inch calendar presents hundreds of promotion ideas, and is put to good use because it hangs on the wall—in sight, in mind. Even restaurateurs who have seen the calendars are requesting copies.

Morrison's Five for Life nutrition program incorporates the company's healthful recipes as well as a nutrition newsletter, take-home recipes and family activity ideas for more healthful lifestyles. It recently rated an 85% acceptance factor in a survey of unit managers, according to Gattuso. The program will be expanded.

A specialty bar program, designed to change throughout the day, will offer managers a choice of as many of 10 concepts they think will fit their clientele. Nutritional foods, snacks, baked potatoes, sandwiches, pasta, express breakfasts, salads, and hot and cold subs are among the choices. But the program is not yet finalized.

SEILER/FDI
$376.1MM*

Snap Into Shape, Waltham, Mass.-based Seiler's nutritional dining program, is a 12-month program that focuses on a different health and fitness topic each month. Themes include facts about fat, nutrition needs for all ages and fiber information. Nutritional recipes, under the TLC (Tasty Lite Cuisine) banner, are available to health-care accounts and will be offered in the education segment in the fall. The recipes, based on recommendations found in the new Dietary Guidelines, are lower in fat, calories, sodium and cholesterol. TLC items include soups, entrees, salads, breakfast items and desserts.

Wok cooking with a twist is the rage at Seiler's Stonehill College account in North Easton, Mass., according to that school's paper. The Wok Room, put in just before the 1990 school year began, features 10 wok stations at which students prepare their own stir-fries. The room, since renamed Wok This Way, draws about 300 students a day.

RESTAURA
$300.0MM

Three new concepts introduced this year emphasize the flexibility for which Restaura, Phoenix, believes clients are looking. "We've talked with a number of clients who, by the nature of their business, size or physical layout, cannot operate foodservices with the overhead and expense of a traditional cafeteria," says Joe Fassler, chief operating officer. "But those same customers recognize the importance of foodservice in boosting morale and decreasing absenteeism."

RestauraMart is a convenience-store concept designed for companies with 500 or fewer employees or with complexes that have buildings set far apart from one another. The stores come in three sizes, from 150 to 500 square feet. They offer salad bars, chili, soup, yogurt, premade sandwiches, rotisserie chicken, hot dogs, baked goods (including Dunkin' Donuts), and self-serve drinks, as well as snacks and sundries.

RestauraCarts enable foodservices to take the food to the customer. They come in four variations: Bakers Rack, Mexican, Deli sandwiches and salads, and a from-scratch pizza concept based on sister company Carson International's La Strata.

Finally, Themed Executive Catering, specializing in regional cuisine, answers a tremendous increase in the demand for in-house catering. "We can put on a function for about half the price of an outside caterer," says Joe Whoric, president of Restaura dining services. "That's a draw in today's economy. Not only do we cost less, but we save clients the cost of executive time and travel when functions are held in-house."

THE WOOD COMPANY
$198.3MM

Today's Top Hits is the latest extension of The Wood Company's menu marketing program. Pasta, fajitas, stir-fried and sautéed items, dressed baked potatoes, tropical fruit drinks, hot hoagies and omelets all are designed for custom preparation at servery stations.

Sandwiches are one of the Allentown, Pa.-based company's strongest lines. At Stack's Deli, new Stacked-to-the-Max sandwiches include shrimp with herb and Havarti cheeses, feta cheese and spinach with yogurt, garlic and cucumber, and a selection of savory panini—classic Italian sandwiches on baguettes.

Coming up: more on-site bake shops and convenience stores, as well as the launch of Heartland Selections, menu options limited in calories, sodium, cholesterol and fat. *—B.L.*

*R&I estimate

400: MILITARY

MILITARY
$4.8 billion
34.8% of all
400 institutional sales

TOP TRENDS
- Serving from alternative locations, including takeout and full-service dining, as well as mobile carts
- Emphasizing nutrition, with many new menu items billed as being low-fat, low-calorie or low-salt

COMING UP
- Exchange Service: More branded and franchised concepts
- USAF: Ad campaign promoting nutrition among base personnel
- USMC: Updated foodservice facilities with enhanced takeout operations and computerization, and foodservice training program in cooperation with Marriott Corp.

BEST SELLERS
- Hamburgers
- Fried chicken (also popular: boned skinless breasts, stir-fries, sandwiches)
- Pizza
- Salad bar
- Soft-serve ice cream and yogurt

A complete ranking of the 400 by segment begins on page 21.

†Commercial equivalent

MIDDLE EAST CONFLICT FUELS SURGE IN FOOD PURCHASES

Chicken, fish, fruits and vegetables top the Armed Forces' shopping list.

Military foodservice operations boomed last year as reserves were called to active duty and U.S. troop strength increased in the Persian Gulf.

U.S. Air Force officials report an increase of $40 million in food and beverage purchases for the year. Marine Corps figures reflect a rise of more than $20 million.

As military foodservice grew bigger, it also grew lighter, with chicken, fish, and fruits and vegetables receiving heavy promotion as healthful alternatives to the top-selling hamburger.

Many facilities also marketed branded product lines and takeout operations.

U.S. NAVY FOOD SERVICE SYSTEMS
$954.8MM†
Naval foodservice officials have eliminated the portion of the Navy Ration Law stipulating butter as the only allowable bread spread; general messes now can offer patrons a choice of margarine or butter.

To cut fat from menu items, the Navy plans to offer a greater selection of low-calorie salad dressings. Other new menu items include brown rice and a variety of fresh fruits and vegetables. Planned for 1991: dehydrated yogurt mixes with flavoring packets.

ARMY & AIR FORCE EXCHANGE SERVICE
$636.7MM†
Branded concepts abound at the Exchange Service, which runs post exchange (PX) operations on military bases. It introduced The Chicken Loft (specialty chicken entrees) and Sweet Reflections (gourmet coffees and desserts) in 1990.

Mobile food carts, offering such concepts as Frank's Franks, also play a key role in the Exchange Service's campaign to "take foodservice to the customer."

Franchised chicken, hamburger and pizza programs, already in place at several locations, will expand in 1991. An Oriental food concept is planned for introduction this year.

U.S. AIR FORCE ENGINEERING AND SERVICES CTR.
$408.0MM†
As part of their continuing emphasis on nutrition, Air Force foodservice operations plan several healthful menu additions for 1991. Patrons will have a choice of a low-calorie entree at every meal; and the Air Force will offer a no-cholesterol egg substitute at breakfast.

A satellite-feeding program continues to grow, serving on-duty crews during off-peak hours. These walk-up, takeout facilities generally are located near work sites, such as aircraft maintenance areas.

—Pam Erickson

Military foodservices are drafting more branded concepts and service styles.

400: TRANSPORTATION

TRANSPORTATION
$2.8 billion
20.3% of all
400 commercial sales

TOP TRENDS

- Upscale meal service that complements trendy foods
- More entree choices; lighter, more nutritious breakfasts, lunches and dinners
- Greater attention to coach passenger meal service

NEW ON THE MENU

- Grilled chicken and fish
- Angel hair, fettuccine and other pasta varieties
- Fresh salads
- Vinaigrette sauces and dressings
- Fresh fruit, frozen yogurt desserts
- Cold cereal, multigrain bread at breakfast
- Regional entrees
- Fresh snacks, i.e. fruit and cheese
- Cookies baked on board

A complete ranking of the 400 by segment begins on page 21.

AIRLINE AND RAIL MEALS SHIFT TOWARD UPSCALE AND TRENDY

First class boasts fresh-baked cookies, grilled fish; coach gets more attention.

The nation's air travelers and Amtrak fans are getting a taste of the transportation segment's new marketing ploy—upgraded food and presentation.

CATERAIR INTERNATIONAL
$1,162.0MM†
Potomac, Md.-based Caterair is emphasizing more healthful fare, fresh products and presentations.

On international flights, patrons are offered lobster fajitas with Jack cheese and jalapeño peppers, and veal with mushrooms. In building menu themes, Caterair focuses on patrons' destination rather than their departure points.

Hot and cold grilled foods head the list of entrees served on domestic flights. Chicken and fish, for example, are marinated, cooked just enough to show grill markings, then refrigerated and finished on board. Some airlines do on-board baking of French bread, bagels, muffins and cookies.

DOBBS INTERNATIONAL SERVICES
$460.0MM†*
Dobbs, based in Memphis, Tenn., reports that requests for fish courses have jumped from 10% to nearly 30% during the past year. To meet this demand, Dobbs has added grilled swordfish and salmon pasta to its list of first-class seafood dishes.

SKY CHEFS
$385.6MM†
Menus for Sky Chefs, Dallas/Fort Worth Airport, feature more pastas, salads and grilled entrees such as fish and marinated Southwest chicken.

To accompany these new dishes, Sky Chefs developed vinaigrettes flavored with sesame, peanut, soy, mirin (rice wine) or rice vinegar to replace traditional sauces.

Coach passengers are enjoying more salads, fresh fruits and low-calorie desserts. Entrees such as chicken and fettuccine are appearing in lieu of the usual lasagna. Snacks, served on flights that don't offer full meal service, include roast beef or turkey sandwiches on fresh-baked seven-grain bread served with chef's salad or soup.

AMTRAK
$68.9MM
Amtrak is trying to refine what it has rather than make any wholesale changes. The Washington-based carrier will rotate its sandwich lineup more frequently to give the appearance of change.

Items in test include low-sodium, low-calorie and low-cholesterol entrees; fresh items; vendor-prepared specialty sandwiches packaged with vegetables; pizza and pizza vending machines; and sparkling wine. *—B.M.D.*

Transportation companies use upgraded food and presentations to attract travelers.

*R&I estimate; †commercial equivalent

400: HEALTH CARE

MENU CHANGES BALANCE LOW COSTS AND HIGH NUTRITION

Health-care foodservice grapples with scratch vs. preprepared foods.

The words might have changed, but the song remains the same. Health-care foodservice directors must provide cost-efficient foods for patients, residents and employees, regardless of rising costs, changing demands and an increasingly transitory labor pool.

Some operators, like United Health, have turned to preprepared foods to ease their labor woes. For others, the solution isn't so clear. "Our patients expect scratch cooking, so that's what we provide," says a hospital foodservice director in Texas. "The labor problem is a fact of life. We just keep training and retraining."

As in other segments of the industry, customer petitions are spawning nutrition-oriented promotions as well as branded product lines. Yet, says a Humana employee, "Our heart-healthy foods are on the menu every day. But when it comes time to choose, an awful lot of people head straight for the onion rings."

UNITED HEALTH
$238.0MM†
HEALTH CARE & RETIREMENT
$45.6MM†

Several years ago, Toledo, Ohio-based Health Care & Retirement and Unicare, a division of Milwaukee-based United Health, combined their buying power. That union resulted in volume discounts and enhanced stature in the marketplace for both companies.

Working with manufacturers, the two nursing-home companies now develop products geared specifically toward their needs.

Convenience entrees, customized to meet specified nutritional and taste requirements, were successfully introduced to both HCR and Unicare residents this spring. Other new products include pollock squares and fillets, and a line of precooked, preportioned meats. These are reheated, then served with low-sodium or regular gravy.

HUMANA
$101.9MM†

Autonomous member units mean greater diversity in the foodservice offerings at Louisville, Ky.-based Humana hospitals. Foodservice directors at various locations say "lighter" foods such as broiled chicken and fish are popular with patients; employees request these items as well as ethnic specialties, for instance, burritos and stir-fries.

Brand-name promotions are popular at Humana operations. Many units also offer the system's own line of heart-healthy entrees in addition to commercial products. These menu listings are branded with a heart to call attention to their low fat and cholesterol contents. —*P.E.*

A varied customer base is prompting health-care foodservices to specify custom products.

HEALTH CARE
$1.7 billion
12.3% of all
400 institutional sales

TOP TRENDS

▶ Decentralized purchasing: Individual buying makes each hospital a separate operating entity

▶ Customized products: Operators provide manufacturers with specifications for definitive food items

▶ Branded products: Menu promotions feature manufacturers' or institution's own brand-name product lines

▶ Privilege of choice: Balanced offerings of healthful and traditional items help keep health-care employees happy

COMING UP

▶ National Medical Enterprises: Increased productivity, participation in group purchasing program

▶ The Evangelical Lutheran Good Samaritan Society: Computerization of all corporate record keeping

A complete ranking of the 400 by segment begins on page 21.

†Commercial equivalent

400: EDUCATION

SCHOOLS FOCUS ON MENU ITEMS THAT BUILD THE STUDENT BODY

Operators add kiosks and carts to bring popular grab-and-go food to students.

The conflict still exists in schools: how to make money and still provide students with food that is good for them. The odds against accomplishing this feat are great—foods that are lower in fat, sodium and sugar generally aren't popular with students.

Yet many foodservice directors are becoming adept at balancing the bottom line and their consciences. Their success lies in offering foods students want to eat—including a plethora of healthful choices.

School foodservice directors also are adding dollars to bottom lines by taking their business to customers. Mobile carts and kiosks offering students such popular finger foods as pizza, hot dogs and sandwiches now dot campuses.

Schools also are heeding customers' cries for variety, offering traditional foods at nontraditional times (or nontraditional foods at traditional times, depending on one's point of view). For example, many programs now serve pizza for breakfast.

Some districts are unabashedly copying their commercial counterparts. Indianapolis offers a breakfast selection adapted from a meal the foodservice director savored on an early-morning airplane flight.

And branded products—particularly pizza—are starting to appear on campus.

Simultaneously, schools are making an effort to meet the USDA's Dietary Guidelines (which emphasize moderation) by cutting back on the fat served in meals. There are more fruit-filled muffins on breakfast menus, for example, instead of eggs, cheese and sausage.

Other schools have found the task of balancing nutrition and cash flow too daunting and have dropped out of the National School Lunch Program.

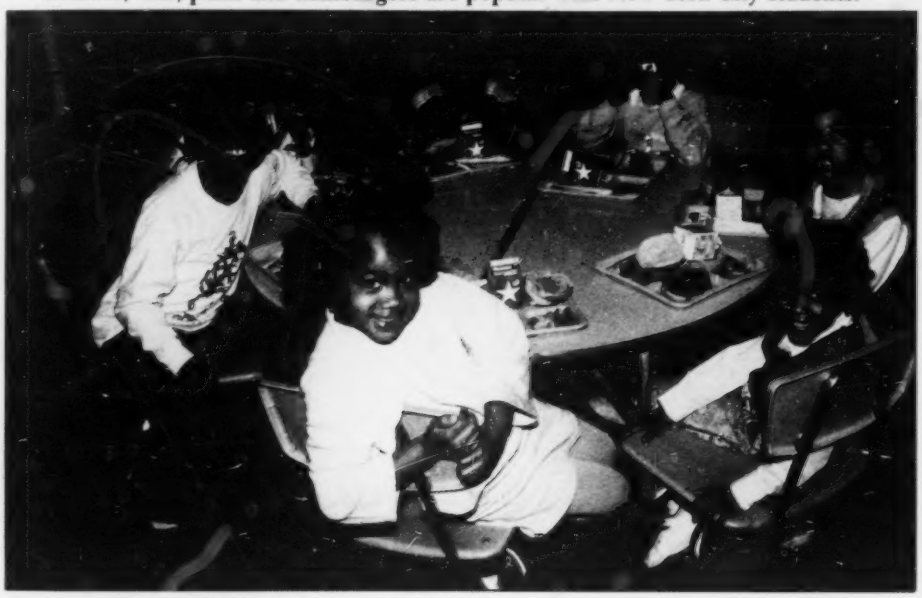
NEW YORK CITY BOARD OF EDUCATION
$322.0MM†**

The preferences of students in New York haven't changed much in the last year. Still popular are chicken, fish, pizza and hamburgers. In sections of the city with high concentrations of people from the Caribbean, Jamaican spiced beef is in demand.

In the experimental testing stage, and possibly for inclusion on school menus next year, are a lean ham-

continued on page 168

Chicken, fish, pizza and hamburgers are popular with New York City students.



EDUCATION
$1.1 billion
8.0% of all
400 institutional sales

TOP TRENDS

- Positioning kiosks/carts with popular hand-held foods around campuses to make foodservice convenient for more students
- Bringing branded concepts and products on campus
- Implementing more breakfast programs
- Lowering the fat content in menus to meet USDA Dietary Guidelines
- Constructing schools (and kitchens) in regions with expanding populations; renovating existing facilities

BEST SELLERS

- Pizza
- Fruit-filled turnovers
- Mexican chili dogs
- Burritos
- Chicken nuggets
- Sweet-potato cookies
- Breakfast taco
- Chicken fajita pita
- Whole-grain waffles
- Nonfat frozen yogurt
- Rib nuggets
- Chicken wings with barbecue sauce
- Frozen fruit drinks

A complete ranking of the 400 by segment begins on page 21.

**Company estimate; †commercial equivalent

400: EDUCATION

continued from page 165

Michigan State University added more stir-fry dishes such as shrimp vegetable.

MEAL BREAKOUT
Here are some meal breakout statistics from selected metropolitan areas:

Broward County School Board
Percent of students receiving each type of meal: free, 42%; reduced, 7%; full, 51%

Dade County Schools
Percent of students receiving each type of meal: free, 48%; reduced, 8%; full, 34%

Dallas Independent School District
Percent of students receiving each type of meal: free, 66.1%; reduced, 6.6%; full, 27.3%

Hillsborough County School Board
Percent of students receiving each type of meal: free, 45%; reduced, 8%; full, 47%

Houston Independent School District
Percent of students receiving each type of meal: free, 80.6%; reduced, 4.9%; full, 14.5%

School District of Philadelphia
Percent of students receiving each type of meal: free, 94%; reduced, 4%; full, 2%

burger, a cheese calzone, yogurt-based baked potato toppings and new items using commodity turkey.

LOS ANGELES UNIFIED SCHOOL DISTRICT
$208.6MM†**
To generate new revenue, the Los Angeles school system sells snacks from mobile carts at locations remote from cafeterias. The district also has introduced boxed pizza and canned carbonated beverages.

DADE COUNTY SCHOOLS
$89.6MM†**
Dade County is concentrating on its takeout program, including implementation of hot dog, ice cream and beverage carts in senior high schools. The department is redesigning existing operations and adding production kitchens to satellite schools.

SCHOOL DISTRICT OF PHILADELPHIA
$50.7MM†**
Popular in Philadelphia these days are pizza, fruit-filled turnovers and chicken nuggets. Menu items added in 1990 include burritos, egg rolls, super buns, super doughnuts and fruit-filled breakfast cupcakes. This fall, students will see on menus cheese pockets, Mexican chili dogs, and macaroni and cheese with turkey-based ham.

DETROIT PUBLIC SCHOOLS
$44.8MM†**
This year, Detroit is emphasizing an equipment replacement program in the district's 20 base kitchens. Each produces 3,000 to 5,000 hot lunches daily.

Serving more nutritious foods is another major emphasis. For instance, the school worked with the company that manufactures its seasoning mixes to reduce their salt content by 50%. In cafeterias, fresh fruit is available every day, and only low-fat milk is sold.

The daily menu includes an entree from the basic rotating menu, pizza, two or more deli sandwiches and a large chef's salad.

HOUSTON INDEPENDENT SCHOOL DISTRICT
$44.2MM†**
Last year, Houston implemented its "Choose Right-Eat Right" program in its 169 elementary schools. It also added pork riblets and lasagna to the menu. Popular on the menu are pizza and burritos. Like other schools, Houston plans to add new items to its breakfast program.

DALLAS INDEPENDENT SCHOOL DISTRICT
$42.8MM†**
Marjorie Craft, this year's Silver Plate winner in the schools category, has initiated a "Healthy Meal Deal" nutrition awareness pilot program in 10 Dallas elementary schools. The "Healthy Meal Deal" is a meal pattern equivalent featuring a whole-grain sandwich, fresh fruit and vegetables.

Popular items on the menu include fiesta salad, pizza and chicken nuggets. New items this year include a chicken fajita pita, a breakfast taco, Louisiana meat pie, sweet-potato cookies and a Mexican chili dog.

MICHIGAN STATE UNIVERSITY
$38.9MM†**
Most college students still are convinced they're indestructible; But even these customers are starting to demand more healthful food.

The most popular entrees at Michigan State in East Lansing are chicken snacks, pizza, pasta and Mexican entrees. "Lighter menus" is how Robert C. Underwood, vice president for housing and foodservice, describes the overall changes in menus during 1990. These include more sandwich-style entrees for the Kellogg Center Hotel, and additional stir-fry dishes, such as shrimp vegetable, and marinated chicken with fresh vegetables, for use in the residence halls.

In a quest for more revenue—not uncommon in colleges and universities these days—MSU is looking for new services to offer customers, including a Healthy Food delivery program from the union to campus offices. The university also is working on introducing a debit card system.

BROWARD COUNTY SCHOOL BOARD
$38.6MM†**
Broward County, Fla., has put salad bars in all elementary schools and implemented summer foodservice programs for children in 68 out of 161 schools with kitchens. Popular on menus: chicken nuggets and pizza. New items added in 1990 were breakfast loaf bread and whole-grain waffles. What novel-for-Broward item can students expect to see this fall? A Belgian waffle stick.

HILLSBOROUGH COUNTY SCHOOL BOARD
$33.6MM†**
Students in Hillsborough, Fla., will see more a la carte menu selections at the secondary level. Most popular are branded items such as Pizza Hut pizza. Added to the menus in 1990 were nonfat frozen yogurt, rib nuggets, chicken wings with barbecue sauce, and frozen fruit drinks.

—Susie Stephenson

**Company estimate; †commercial equivalent

400: RECREATION

RECREATION OUTLETS FEATURE ETHNIC FOOD AND LIGHTER FARE

Cruise lines in particular launch salad, pasta and lower-fat menu items.

This year, *R&I* expands its recreation segment to include cruise lines. Overall, as travel dropped in the first part of 1991, destination-type recreation businesses suffered more than operations with a loyal local draw. On menus, healthful and ethnic foods found themselves at the center of attention.

WALT DISNEY WORLD
$506.0MM
Lake Buena Vista, Fla.-based Walt Disney is concentrating on providing healthful alternatives, such as lower-fat items and turkey burgers.

Disney introduced two new restaurants in 1990 at its MGM Studios theme park in Orlando, Fla. The first, designed after a Hollywood back lot commissary, features cafeteria-style food. At the other concept, Sci-Fi Dine-In Theater, patrons eat and watch B-movie science fiction clips while sitting in replicas of 1950s automobiles. A few new restaurants are planned for 1991.

ROYAL CARIBBEAN LINES
$103.6MM†
Miami-based Royal Caribbean added seafood, pasta and salad selections to its shipboard menus in 1990, with more to come this year.

Also on line for Royal Caribbean: a low-fat, low-cholesterol dining program based on American Heart Association guidelines and new automatic juice and coffee dispensers that provide 24-hour free service.

HOLLAND AMERICA LINE
$60.2MM†*
In 1990, Holland America, Seattle, began a healthful menu program, introducing no-cholesterol products and listing special dietary information on menus.

Holland operates a Continental dining room on each of its ships.

LEISERV
$42.2MM
Deerfield, Ill.-based Leiserv switched to paper cups from plastic foam cups this year, and sponsored a junior bowler scholarship program in conjunction with a candy manufacturer.

For 1991, Leiserv is offering a kids meal package in the shape of a bowling bag: it includes coupons for meals and bowling games. *—N.P.*

Foodservice for local attractions such as sports events and bowling fared better in last year's poor travel economy.

*R&I estimate; †commercial equivalent

RECREATION
$1.0 billion
0.9% of all
400 commercial sales

TOP TRENDS
- ▶ Walt Disney World: healthful, low-fat menu items, turkey burgers
- ▶ Busch Entertainment: purchased all Sea World restaurants
- ▶ Royal Caribbean: free 24-hour automatic juice and coffee dispensers
- ▶ Holland America: pasta bar
- ▶ Leiserv: Switched to recyclable paper goods

COMING UP
- ▶ Walt Disney World: more restaurants in the MGM Studios theme park
- ▶ Royal Caribbean: more seafood and salad selections
- ▶ Leiserv: kids meal promotion in the shape of a bowling bag

EXPANSIONS
- ▶ Walt Disney World: opening Euro Disney in 1991, planning new park in Anaheim, Calif.
- ▶ Holland America: building new ships for 1992; recently acquired three large sailing vessels
- ▶ Leiserv: opened five new locations in bowling centers

A complete ranking of the 400 by segment begins on page 21.

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